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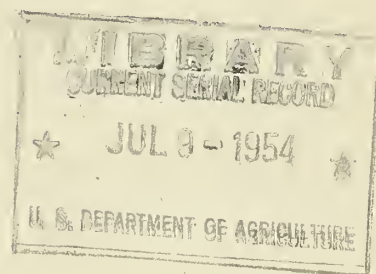
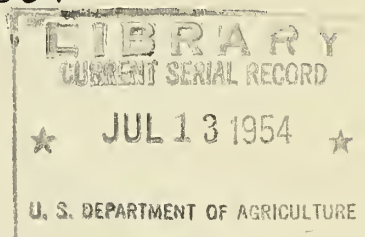
JANUARY 11, 1954

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✕ **WORLD**

AGRICULTURAL SITUATION

1954 ✕



THIS CIRCULAR REPLACES THE WORLD FOOD SUMMARY ISSUED ANNUALLY BY THE OFFICE OF FOREIGN AGRICULTURAL RELATIONS (NOW THE FOREIGN AGRICULTURAL SERVICE) FROM 1945 TO 1953. IN ADDITION TO THE SUMMARY OF THE FOOD SUPPLY SITUATION, THERE IS INCLUDED A REVIEW OF THE PRINCIPAL NON-FOOD AGRICULTURAL PRODUCTS.

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WORLD AGRICULTURAL SITUATION SUMMARY, 1953-54

The 1953-54 agricultural season is the sixth consecutive season since the close of World War II in which world agricultural production was above the prewar (1935-39) average. 1/

In each of the three seasons preceding the present one, material advances were registered in the output of agricultural products. Total outturn in 1953-54 is only slightly above that of the preceding season and this leveling off may continue. Pointing in this direction are the mounting surpluses of some commodities and accompanying price declines, with no corresponding decreases in production costs, together with announced plans to limit production of some commodities in some countries.

For the world as a whole, agricultural production in relation to population, is nearly equal to prewar. Various economic handicaps which have prevented a balanced distribution of the world's agricultural output, however, have led to the building up of surpluses in some exporting countries, just as in the prewar period. The expanded agricultural production in deficit countries and present world economic conditions and prospects for the near future point to a continuation of about the present level of over-all consumption of food and fiber per capita, with a smaller portion moving in international trade than in recent years.

World food supplies appear to be at record heights in 1953-54. Production exceeds past records for several major commodities, including rice, sugar, meat, animal fats and citrus. Production is high though not at record levels for wheat, potatoes, beans and peas, edible vegetable oils and dairy products. On the whole, the 1953-54 production of the major commodities which contributes about 80 percent of the total food, is estimated at a fractional percentage above 1952-53 and slightly more than 10 percent above the prewar average. (See Table 1.)

All of these high level outturns of food and fiber need to be considered in relation to the number of people to be fed and clothed, of whom there are now about 15 percent more than in the prewar period. Production of the commodities used in the food index has not quite kept up with the increase in population. But during this period there has been a marked expansion in production and, therefore, in consumption of some commodities for which world estimates are not available. These include special high-calorie vegetables such as sweetpotatoes, cassava and other tropical vegetables. It should be noted also that the scarcity of food during the war and the postwar period has resulted in less waste and more efficient utilization of foods.

1/ The 1953-54 season in the main includes the 1953 harvest already completed in the Northern Hemisphere and the harvest yet to be completed in the next few months in the tropical areas and the Southern Hemisphere; for livestock products it includes the 1953 calendar year production; the consumption year refers to July 1953-June 1954 in the Northern Hemisphere and the calendar year 1954 in the tropical areas and the Southern Hemisphere.

Table 1: World Production of Selected Agricultural Products, Averages
1935-39 and 1945-49, Annual 1951-52 to 1953-54

Commodity	Unit	Averages			Annual		
		1935-39	1945-49	1951-52	1952-53	1953-54	
----- Millions -----							
Food products:							
Rice, milled	Short tons:	117.2:	114.3:	118.2:	124.9:	125.8	
Wheat	Bushels	6,025	5,840	6,470	7,280	7,045	
Rye	"	1,732	1,525	1,665	1,600	1,540	
Sugar, centrifugal	Short tons:	28.5:	27.4:	38.3:	36.1:	39.0	
Sugar, noncentrifugal	"						
gal	" "	5.4:	6.0:	6.4:	6.6:	6.7	
Vegetable oils,							
edible	" "	7.1:	7.3:	9.0:	8.0:	8.7	
Coconut and palm							
oils	" "	3.6:	3.1:	4.0:	3.8:	3.8	
Animal fats	" "	9.0:	8.1:	9.8:	10.0:	10.1	
Marine oils	" "	1.1:	0.6:	1.0:	1.0:	0.9	
Potatoes	Bushels	8,366	7,679	7,955	8,019	8,283	
Pulses 1/	Bags 2/	292.6:	254.0:	299.3:	291.0:	304.7	
Deciduous							
fruits 3/	Short tons:	62.7:	55.7:	61.5:	64.4:	60.5	
Citrus fruits	" "	9.8:	12.7:	13.6:	14.5:	15.5	
Meat	Pounds	4/68,000	5/67,000	73,800	77,500	80,800	
Milk	"	4/501,000:	450,000	500,400	500,200	516,300	
Coffee	Bags 6/	41.6:	-	38.5:	40.3:	40.6	
Cacao	Pounds	1,579	-	1,483	1,663	1,554	
Food Index 7/		100	100.0:	94.7:	105.8:	109.8:	110.4
Feed products:							
Corn	Bushels	4,760	5,280	5,260	5,640	5,610	
Oats	"	4,365	3,930	4,190	4,190	3,970	
Barley	"	2,365	2,170	2,540	2,745	2,720	
Industrial raw							
materials:							
Cotton	Bales	51.7:	25.7:	35.7:	35.7:	36.7	
Wool	Pounds	8/3,930	5/3,840	4,050	4,330	4,410	
Tobacco	"	9/6,519	-	-	7,230	7,324	
Industrial oils	Short tons:	2.9:	3.0:	3.1:	3.3:	3.2	

1/ Haricot beans, peas, lentils, chickpeas (garbanzos). 2/ Bags of 100 pounds each. 3/ Includes apples, pears, peaches, apricots, cherries, plums, prunes, grapes and pineapples. 4/ 1934-38. 5/ 1946-50. 6/ Bags of 132.276 pounds each. 7/ Edible portions of above products combined on the basis of calorie content. 8/ 1936-40. 9/ Calendar year. See footnote on page 1 for more definite description of periods covered.

Source: Foreign Agricultural Service, United States Department of Agriculture.

Feeding of livestock also has become more efficient, and an increasing quantity of corn, barley and other coarse grains has been used as food. It is likely, therefore, that the increase above prewar in the over-all consumption of food was greater than the increase in the production of the basic foods shown in Table 1 and that per capita consumption last year and this year was not greatly different from the 1935-39 average. Even so, total food production and population at best have reached an approximate balance for the world at large. The great problem that remains is the need for increased international trade so that surpluses do not again pile up for any length of time in some areas in the face of deficits in others.

The second large output in two years has already contributed to a further accumulation of stocks of agricultural commodities. Large carry-in stocks of wheat added to the large current crop provide a record-breaking supply. Stocks of sugar and many other food products also are high; there was a large carry-in of cotton at the start of the 1953-54 cotton year. The improved agricultural production and the recent easing of international tensions have accentuated hand-to-mouth buying in consuming countries and piling up of stocks in exporting countries.

World wheat production in 1953-54 of 7,045 million bushels is estimated at 3 percent below the previous season's record crop but a billion bushels above the prewar average. The rye crop of 1,540 million bushels also is 3 percent below the preceding year and materially below the prewar average. Total breadgrain production of 254 million short tons amounted, therefore, to 9 million tons less than in the preceding season but 25 million tons above prewar. The world rice production of 126 million short tons (milled basis) is estimated to be 1 million tons above the preceding season's crop which was a record production to that time.

The near-record production of fats and oils includes a substantially larger olive oil crop than in 1952 in the Mediterranean Basin and improved output over 1952 of peanuts, soybeans, palm oil and kernels in Asia and Africa. Output of animal fats in the calendar year 1953 was slightly larger than in 1952 although lard production was down because of the reduced hog slaughter in the United States.

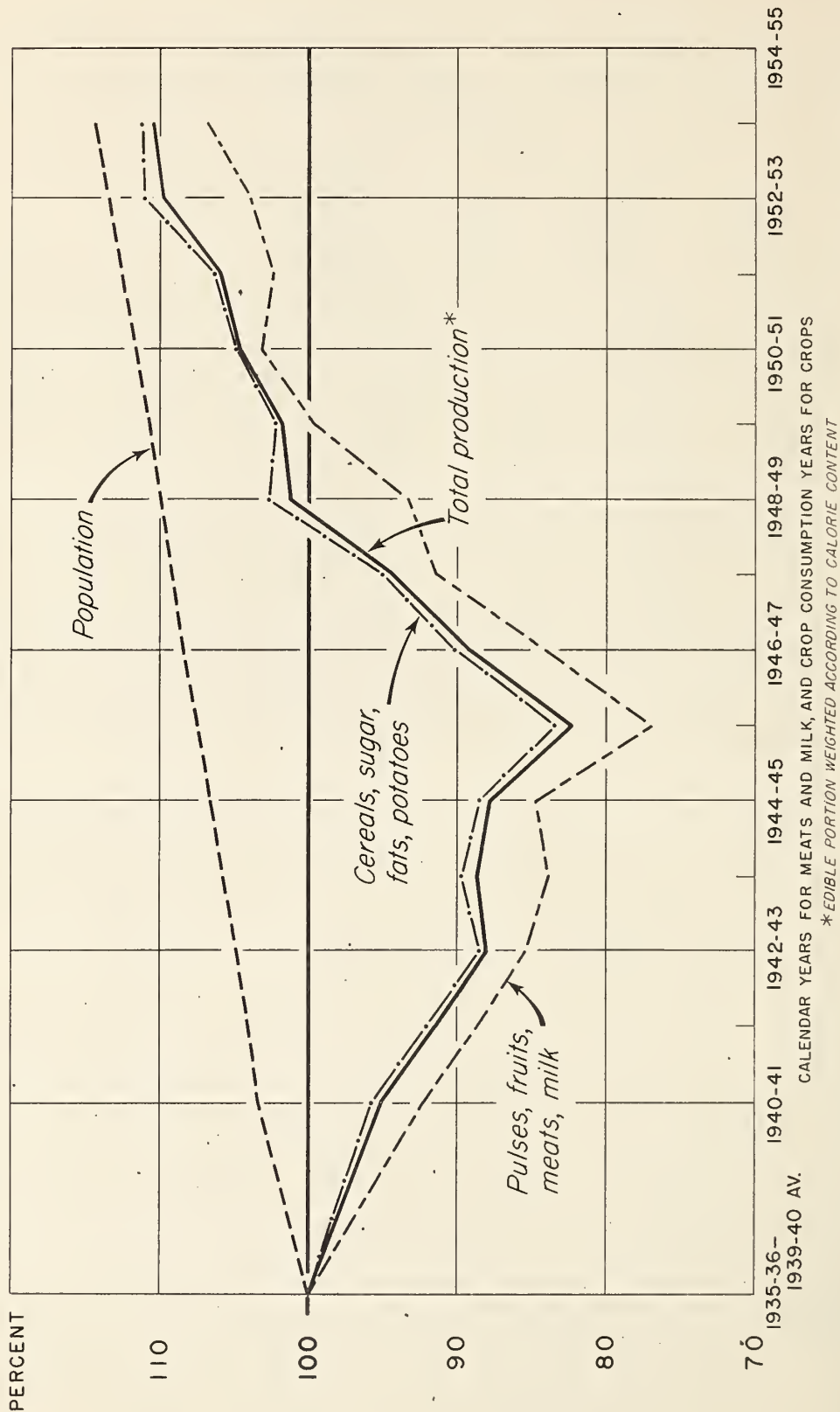
World production of centrifugal sugar of 39 million short tons (raw value), 2 percent above the previous record of 1951-52, is 37 percent above the 1935-39 average. The record production was achieved despite restrictive measures by Cuba and Puerto Rico to hold down harvested production. The potato production of 8,300 million bushels approaches prewar, while beans and other pulses combined are 4 percent above prewar. Production of citrus will reach a new record of 15.5 million short tons. Apple and pear production are substantially below preceding seasons but above prewar, and another short crop of grapes is indicated.

Over-all production of milk of 516 billion pounds was about 3 percent above the level of the preceding three years. Consumption of fluid milk remained about the same. Butter production was substantially higher and cheese made a moderate increase. A sharp increase in dried milk was about offset by a reduction in canned milk. World meat production in 1953 of 81 billion pounds was 4 percent above the previous record in 1952 and

FIGURE 1.

WORLD PRODUCTION OF SELECTED FOOD PRODUCTS IN RELATION TO WORLD POPULATION TRENDS 1935 - 53

(1935 - 39 = 100)



16 percent above the prewar average. While the corn and barley crops were down slightly and oats below average, the large carry-in stocks of coarse grains and supplies of other feeds indicate that present levels of milk and meat production can be maintained.

Production of nonfood items likewise continues high. The world cotton crop of 36.7 million bales is the third very large crop since 1950 and is 15 percent above prewar. It is above recent consumption levels by over 3 million bales and surplus stocks are again accumulating. Wool production set a new high of 4.4 billion pounds, following the lead of the large Australian output. Even the beverage crops, coffee and tea, continue on a high level, though cacao beans, source of cocoa and chocolate, remain below prewar. Jute production was cut sharply, but hard fibers--abaca, henequen and sisal--reached a combined record supply. Tobacco production in 1953 was somewhat below 1952 and at 12 percent above prewar had not quite maintained per capita consumption.

(Continued on Next Page)

Nearly all parts of the world have contributed toward the upward trend in agricultural production though indications available point to a slower rate of expansion in Eastern Europe and the Soviet Union.

Production in North America as a whole is reasonably close to that of 1952-53 and nearly 50 percent above the prewar years. In the United States the 1953-54 outturn is not greatly different from 1952-53, but Canada's output was cut by lower wheat and pork outturns and drought reduced several crops in Mexico.

Agricultural production in Western Europe has made a further substantial increase and now is well above prewar. The region had a second very good harvest, all major food crops showing increases. Feed crops also were large so that the upward trend in output and consumption of livestock products may be expected to continue.

In Eastern Europe, on the other hand, production has not yet recovered to the prewar level. Production of crops is above the low outturn of 1952. Grain and potato crops appear to be below prewar, though sugar, oilseeds, and other industrial crops are above. Cattle numbers continued below prewar but hog numbers were at prewar or above. In the Soviet Union, breadgrain production is slightly below 1952-53. Feedgrains and potatoes are down and sugarbeets up slightly. Livestock production continued to be low.

In the Middle East production is substantially above 1952 and prewar and a very favorable grain supply is available for feed, food and forage. The upturn was led by Turkey, which had a record outturn not only of grain, but of tobacco and its second largest cotton crop.

The Far East has good crops over most of the region but is still producing little more than before the war. The over-all rice crop this year increased in spite of a drop in the Japanese crop. Southern and Eastern Africa made a favorable recovery from the extreme drought situation in 1951-52. Enlarged exports of vegetable oil products should reflect the increased production there.

The Latin American crop production is about the same as in 1952-53 and 30 percent above prewar. The Cuban and Puerto Rican sugar crops again will be restricted. Argentine output of grain and meat may be lower than in 1952-53, but food production is expected to increase in Brazil, Colombia and Central America. A record sugar crop is expected in Australia, but grain production is reduced by drought. In New Zealand outturn should be at high level in 1954. Wool production seems certain to continue high in both Dominions.

The distribution of the world food and fiber supplies will be materially affected by economic conditions throughout the world. The predominant opinion for the year 1954 as a whole is that demand will be well maintained. Industrial production at present is at a high level in response to universal efforts to improve the efficiency of production and raise the level of living not only in well established industrial countries but also in underdeveloped countries. Even though economic activity in the United States has declined, disposable income is likely to average close to the 1953 level, due in part to tax reduction. Canadian disposable income is also likely to remain high; and the general industrial activity in Europe seems likely to remain at the present level which is above prewar. Demand in most of Latin America should benefit from the continued high level of agricultural exports to Europe and North America. On the other hand, some factors tend to restrict the demand for agricultural products in some parts of the world. Thus, reduced export:

and declines from recent high levels in the prices of some industrial raw materials from southern Asia and parts of South America have reduced buying power in those countries; also the general increases in domestic agricultural production in all regions of the world have made many countries less dependent upon imports, which in turn have been reflected in price declines for many commodities during the last marketing season and thus far in the current 1953-54 season.

Recent actions by governments in many parts of the world reveal a ground swell of policies designed to improve the well-being of farmers and consumers alike. The return of trade to private channels; the increased use of incentives to expand production; the measures initiated to increase the producers' share of the products of the soil; the seemingly more favorable attitude of Iron Curtain countries toward expansion of consumption at the expense of investment; and the keen world-wide interest in improved farm practices should each make a modest contribution not only to increasing supplies of food and fiber but also to moving them into consumption.

Prospects for Next Season's Winter Crops

Winter crops in the Northern Hemisphere, which will provide part of the world food supplies during the 1954-55 consumption year, are reported to be in better condition than a year ago. In the United States winter wheat yield prospects were good but seedings were cut 10 million acres in response to the acreage allotment program. With better moisture from late October to year's end, prospects point to a 750 million bushel winter wheat crop compared with 878 million, the final 1952-53 outturn.

In Europe the fall and early winter likewise have been generally favorable to seeding. Reports received to date from Asia show fall seeding conditions to be satisfactory.

THE SITUATION BY COUNTRIES

CANADA

Stimulated by a high level of domestic demand, and with favorable weather, Canadian agricultural production has expanded to new high levels during the past 3 years. Domestic consumption of nearly all Canadian agricultural products is high and tends to absorb an increasing percentage of domestic output, except in the case of grains where supplies of both bread-grains and feedgrains, after the 1953 harvest, were at record or near-record levels. Up to this time acreage allocations have not been put into effect for grains but the tight storage situation may be a factor influencing planted acreage in 1954.

Production: Wheat output for the past 3 years reached the unprecedented average of 618 million bushels or nearly twice the 1935-39 average with no increase in acreage. A large 1953 rye crop of 28 million bushels, together with a large carry-over provided record rye supplies for 1953-54 of 44 million bushels compared with 33 million bushels in 1952-53.

Feedgrain production in 1953 approached the record outturn of 1952. Barley production of 273 million bushels was slightly below the 1952 crop but more than 3 times the 1935-39 average. Oats production has not expanded so much, amounting to 405 million bushels in 1953 compared with 467 million in 1952 and 338 million for the 1935-39 period.

Although production of 10.5 million bushels of flaxseed was 20 percent lower than in 1952, a record again was achieved in the production of 4.4 million bushels of soybeans. Nevertheless, Canada again will be a major outlet for United States cottonseed oil and soybeans for the current marketing year.

The 1953 apple crop is the smallest since 1945, but conditions point to a better crop in 1954 for apples as well as continued rising production for most other tree fruits. The potato crop is above average and in excess of domestic needs and prices are extremely low. Flue-cured tobacco production in 1953 was slightly more than 10 percent above the previous year and 19 percent above the 1935-39 output.

Cattle numbers have increased further and marketings amounted to 1.7 million head in 1952-53 compared with 1.4 million in 1951-52, and 2 million in 1948-49. Pork production in 1953 was slightly below a year earlier but the sharp increase in beef and of other meats resulted in larger total meat supplies. Milk production in 1953 was 4 percent larger than a year earlier.

Exports: Record quantities of grain are available for export so that even if exports come up to or exceed expectations during 1953-54 and liberal allowances are made for domestic consumption during the current crop marketing year, unusually large carry-over stocks of wheat, rye, barley and oats are inevitable. It may be expected that there will be larger surpluses of grains at the end of the 1953-54 production-marketing year than there were at the end of 1952-53.

The two million boxes of apples which may be available for export from the 1953 crop will go largely to the United States, but some may be exported to Great Britain if foreign exchange is made available. Difficulty is being found in disposing of the 1953 potatoes because of the large crop in both the United States and Canada.

Flue-cured tobacco exports are largely to the United Kingdom and larger exports are probable from the 1953 crop.

The small export surplus of cheese has been sold to the United Kingdom, while there have been no exports of bacon. Exports of pork to the United States during 1953 were much larger than in recent years but exports of beef and cattle, while larger than in 1952 when exports were restricted by the foot and mouth disease, were much below those of recent years. Shipments of milk and cheese to the United States were also much below normal.

Demand: The domestic demand for the products of Canadian farms appears likely to be sustained at or close to the 1953 level. Business at the close of 1953 remained firm in all activity segments. Government and private capital spending are expected to remain high. Reductions may occur in some basic industries but they are likely to be offset by increases in utilities and service segments. Aggregate consumer incomes might even show a moderate increase and lend strength to the market for agricultural products.

UNITED STATES 1/

Agricultural production in the United States in 1953 continued at about the same high level as in the preceding year and was (41) percent above the prewar (1935-39) annual average. Stocks of some major agricultural commodities on January 1, 1953 were substantially above those of a year earlier. Heavy supplies combined with a substantial reduction in the export demand to bring about a 10 percent decline in the average level of prices received by farmers in 1953 compared with 1952--despite the relatively strong domestic demand situation. This resulted in stocks on January 1, 1954 being even larger than the more than ample stocks of a year earlier.

Food supplies in the United States during 1953 were at near-record levels. The total volume of food produced was slightly larger than a year earlier and two-fifths again as large as the prewar (1935-39) annual average. Wheat supplies at the start of the current season were the largest on record, 8 percent above the previous peak in 1942-43 and the rice crop was the largest ever produced. Sugar supplies from domestic sources, including Territories, are the largest since 1950-51. Record supplies of food fats are likely in 1953-54 because of the large carry-over of cottonseed oil and butter from earlier years and supplies of non-food fats will be about as large as in the previous season. Civilian per-capita consumption of food was about the same as in 1952 and 12 percent above prewar. Per-capita consumption of meats, frozen fruits and vegetables, potatoes, sweetpotatoes, rice, and dry field peas increased during 1953 but small declines occurred for several other foods. Imports of food products totaled about as large as in 1952, but exports of food items were down noticeably, largely because of less wheat being shipped abroad.

The current rate of milk production is the highest of record. Together with accumulated stocks, per-capita supplies are at a high level. Total meat production in 1954 is expected to be a little below 1953, but larger than in any other previous year. Beef production probably will be slightly below the record 1953 output. Although production of feed grains in 1953 was somewhat below the previous year, carry-over stocks at the beginning of the season were sharply higher and total supplies of feed grains for the 1953-54 feeding season are above a year earlier. Imports of feedgrains and rye from Canada, where supplies are unusually large, were much higher than a year earlier during the first half of the 1953-54 season but the imports of other nonfood agricultural commodities in 1953-54 are expected to be about the same.

Cotton supplies are also up sharply due to a crop of 16.4 million bales compared with 15.1 million bales last year and an increase in the carry-over of 2.8 million bales, but supplies of both wool and tobacco are about the same.

1/ Prepared in Agricultural Marketing Service.

Domestic utilization of feedgrains, and tobacco in 1953-54 is expected to be about equal to 1952-53, that of cotton slightly lower and of wool a little larger. With exports of feedgrains likely to be close to those of a year earlier, carry-over stocks of these commodities at the end of the current marketing year will be larger than at the beginning. While exports of soybeans are likely to be very large, the total probably will be limited by high prices reflecting the smallest soybean crop in the United States since 1949. Large supplies of cottonseed oil, owned by the United States Department of Agriculture, are available for export at bid prices, and the Department has indicated a willingness to sell linseed oil at competitive world prices. Large quantities of inedible tallow and greases again are expected to be exported. For cotton, United States carry-over stocks on August 1, 1954 will be higher than last August, possibly by as much as 75 percent, despite an expected small increase in exports. Tobacco exports are expected to at least equal those of 1952-53, and stocks at the end of the current marketing season may be no larger than a year earlier.

Demand: The domestic demand for agricultural products in the United States has been well sustained and little change is expected not only during the remainder of the July-June year but for the entire calendar year 1954. Total consumer income available for spending in 1954 is likely to be about as large as in 1953, and the domestic demand for food and other farm products also should be about as good.

LATIN AMERICAProduction

Crop production in Latin America in 1953-54 is expected to be about the same as in the preceding year, which was 30 percent above the prewar average. Argentina's total output may not reach that of 1952-53, and Cuba's sugar crop again will be restricted.

The food deficit countries have been encouraging increased production in an effort to become self-sufficient. Wheat production, for example, has risen in Mexico and Colombia, and this, together with adequate supplies of Argentine wheat to supply the needs of Brazil and Chile, will reduce the market in Latin America for Northern Hemisphere wheat during the coming year. Venezuela, Central America, Cuba and the other Caribbean countries will continue to buy normal amounts of wheat and flour, lard, and processed milk.

Trade

Latin America has greatly increased its takings of United States agricultural products since World War II. Prewar exports from the United States were valued at less than \$46 million and increased steadily thereafter to a peak of \$560 million in 1952. While unit values have increased materially, much of this increase was in quantity. In 1952 the small Argentine wheat crop resulted in more wheat imports from the United States by Argentina's traditional markets. For 1953-54 the outlook is for some reduction in imports from the United States, not only of wheat but also of cotton, fruit, and rice. Bolivia will receive economic aid shipments in 1953-54 from the United States of \$5 million worth of wheat, and proposals are being considered for additional aid in the form of edible fats and cotton.

Latin America supplies the United States with more agricultural products than any other area of the world. During 1952-53 coffee, sugar, wool, bananas, cacao, and other agricultural products it supplied this country were valued at more than 2.1 billion. Imports in 1953-54 are expected to be close to that value.

Argentina.--The program for expanding the crop area in Argentina continued to be pushed by the Government in 1953-54, but the shortage of rainfall early in the season reduced prospects for a repetition of the bumper crops of a year ago.

The combined output of crops increased from a low of 36 percent of the 1935-39 average in 1951-52 to 69 percent in 1953. As a result of this increase, grain exports expanded sharply to 3.3 million long tons for the first 10 months of 1953 compared to only 0.8 million tons for the same period in 1952. The area in wheat for the current season is larger but the crop is estimated at only 225 million bushels compared with 287 million last season. Both harvested area and production of oats, barley and rye may be down slightly compared with a year ago as a larger proportion of the planted acreage was used for pasture, but the area in corn is somewhat above last year and current conditions are favorable for the new crop.

The 1953 record tung nut harvest is expected to yield 17,000 tons of oil. The area seeded to flaxseed for 1953-54 was reduced as prices paid producers are relatively unfavorable compared to wheat. The Government is discouraging flaxseed production because of the slack foreign demand. The 1953 sunflower seed crop was much below the preceding year and the harvest in 1954 will be of about the same size.

Frost damage reduced the 1953-54 fruit crop and it is expected there will be little fruit available for export during the current season.

During 1953, wool stocks were reduced by exports of about 470 million pounds - almost 5 times those of a year earlier. Wool production from the 1953-54 clip is expected to total 420 million pounds and large amounts have already been committed under trade agreements. Beef supplies were short in 1953 and exports were held up to supply the domestic market, but rather heavy shipments of mutton have been moving into England to fulfill the meat contract with that country.

Brazil.- Supplies of most foodstuffs in Brazil were larger in 1953 than in 1952, and prospects are good for further increases in 1954, particularly of corn, beans, tapioca, and rice. A record wheat crop has just been harvested, and record corn area has been planted. Oilseed production, on the other hand, estimated at 1,270,000 tons, was one-fifth less than the unusually large tonnage produced in 1952.

The significant exports from Brazil are coffee, cacao, sugar, cotton, and castor beans and oil. The coffee harvest in late 1953 was smaller than a year earlier and prospects for the harvest in late 1954 probably will not exceed the 18.5 million bags produced in 1953. The rate of domestic consumption and exports, however, have been maintained thus far this season. Sugar and cacao production are expected to provide about 200,000 tons of sugar and somewhat less than half that amount of cacao beans for export. A new export policy has brought prices of Brazilian cotton to the lower range of world prices and now enables the Bank of Brazil to export its holdings from the 1952 and 1953 crops. A revision of exchange rates permits the Bank to recoup in cruzeiros the losses incurred in its price support operations. Sales abroad continue at a moderate pace. Plantings for the current season are down from last year, and will result in reduced output compared with 1952-53.

The principal agricultural imports of Brazil are wheat, deciduous fruits, barley malt, hops, and some dairy products. Wheat consumption is increasing faster than production, and imports of more than a million tons needed for 1954 probably will come primarily from Argentina under the terms of a trade agreement with that country. Little foreign exchange is available for the importation of fruit and dairy products. Imports from dollar areas, therefore, will be small or nonexistent.

Cuba is the largest market for United States agricultural products in Latin America. Rice, wheat and flour, fats and oils, dairy products, eggs, dry beans, and processed fruits and vegetables are the principal imports. Purchasing power to buy these commodities comes largely from the sale of sugar. The 1954 sugar crop is expected to be restricted to 5.7 million short tons the same as in the preceding year. Because of this and the consummation of the International Sugar Agreement no great changes are expected in income from the 1954 crop as compared with 1953. The expected value of the crop, however, will be lower than the average of recent years, and imports of agricultural products are not expected to increase above the level of last year.

Production of foods for domestic consumption is expected to continue its upward trend in the coming season, led by a sharp rise in the output of rice. The area in this crop is forecast at more than 200,000 acres compared to 135,000 in 1950-51. About 75 percent of total requirements are still imported, however, mostly from the United States. Imports averaged 5.7 million bags in 1947-52, dropped to 5 million in 1951-52, and then increased to 5.2 million in 1952-53. Imports in 1953-54 are expected to be about the same as for the preceding year.

Mexico.— Mexico's greatest food deficiency is in grain, largely wheat, and it usually imports 10 percent of its grain needs. A severe drought during the summer of 1953 severely reduced the current corn crop to 126 million bushels compared with 1951 production of 134 million bushels. About 50 percent of the country's caloric food requirements are provided by corn. It appears that imports of about 24 million bushels of corn and 11 million bushels of wheat will be required in 1953-54 to provide normal consumption needs, or 20 percent of total grain requirements.

Bean imports also are likely to continue at high levels during 1953-54 as drought reduced the bean crop. Supplies of fats and oils are at about the level of recent years, and requirements in 1954 will call for imports of more than 30 million pounds of lard and from 20 to 50 million pounds of tallow. Wheat production, on the other hand, increased in 1952-53 to 22 million bushels and is expected to increase further in 1953-54. Production of sugar and potatoes also increased, and an export surplus of sugar is available for 1953-54.

In spite of the third successive year of drought in northern Mexico, cotton production of 1.2 million bales was only 5 percent below the record 1951 crop. The market outlook is promising. Most of the crop has already been sold into export channels at a price about 1 cent a pound below the support price for the United States product. Prices on the small remainder have now advanced to about the United States level. Cotton is Mexico's principal export, and cotton, together with a good coffee crop should again assure a substantial supply of foreign exchange.

Venezuela will continue to import large quantities of wheat flour, rice, eggs, powdered milk, sugar, vegetable oils, and potatoes as well as substantial quantities of luxury foods. Most of these imports originate in the United States.

Colombia continued to increase its production of agricultural commodities and food supplies in 1954 from domestic sources are expected to be larger than in 1953. Wheat and flour are still the principal food imports, followed by fats and oils, and barley malt. Cotton production is rising, but the country is not yet self-sufficient and cotton is expected to continue as the major agricultural import from the United States in 1953-54. The actual quantity imported, however, may be no larger than last year's small volume because of a shift since 1951-52 to lower priced Peruvian cotton. Coffee exports, which furnish most of the foreign exchange, will probably be larger in 1953-54 than during the preceding year.

Chile's agricultural production for 1953-54 is expected to fall below that of the high output of 1952-53. Heavy rains and cold weather have prevented or delayed grain seeding, damaged plantings already made, delayed pasture growth, and reduced fruit prospects. With reduced output in the coming year, import requirements will probably increase, particularly for wheat and beef, both of which are usually supplied by Argentina. Chilean exchange control authorities are unlikely to relax their controls for importation of foodstuffs from the United States that require dollar exchange.

WESTERN EUROPE and FRENCH NORTH AFRICA

Production: Western Europe again reported a very good harvest in 1953, with all major crops showing increases over the favorable levels of 1952. Good feed crops promise further increases in output and consumption of livestock products during 1953-54. Grain crops were particularly bountiful in France, Western Germany, Italy, and Greece, these four countries furnishing 60 percent of Western Europe's total grain output. Sugar beets, partly on larger acreage, set a record, following a less satisfactory harvest in 1952, and potato production also was larger in all of the important producing countries. The only country reporting a decline in food production is Spain where drought damage reduced the harvest of grain, dry legumes, and sugar beets below last year's good outturn.

While vegetables and dry legume crops were larger in 1953 in most countries, fruit production, except in the Mediterranean area, fell short of last year, with the result that total output did not reach the 1952 volume.

Output of pork, beef and veal, poultry and eggs in 1953-54 is expected to exceed 1952-53 by a slight margin, while milk production promises a further measurable increase. Larger production of butter and cheese is expected.

While output of vegetable oils was considerably below last year in the northern and western countries, olive oil production in the Mediterranean Basin was very much above the low output of 1952-53.

French North Africa also had another good harvest in 1953. Wheat production is close to the high 1952 level, and though barley production showed some decline, it remains well above domestic requirements. Olive oil output is expected to be the second largest on record, and citrus production to reach a new peak.

Stocks: At the beginning of the consumption year, carry-in stocks of grain, and sugar were fairly large in the most important countries. Large supplies in the exporting countries make it improbable that there will be a normal commercial incentive in importing countries to add to stocks in 1953-54. Incentives might develop only under the influence of special measures such as Government emergency stockpiling, or the formation and neutralization of emergency reserves in exporting countries, or of a future unfavorable crop outlook. On the other hand, it is not expected that stocks will be drawn down significantly during the season, even though the market situation might not be favorable for further accumulation. Most countries seem to prefer to maintain a comfortable stocks position. In some countries an addition to low stocks of United States tobacco and raw cotton appears to be contemplated.

Economic Conditions and Consumption Outlook: Economic conditions in Western Europe are, on the whole, favorable. Employment continues high in most countries. Industrial production, following a lull in 1952, has resumed its upward trend. Balances of trade have improved, partly as a result of more favorable terms of trade with overseas countries, and with this improvement the payments balances have also shown remarkable improvement. Gold and dollar holdings of important importing countries have continued to increase and now cover a substantially higher proportion of the annual rate of their imports. If business activity in the United States continues at a high level, Western Europe should be in a better position to afford further liberalization of trade than it has been for some time, although the earlier upsurge of interest in a convertibility drive (prominently sponsored in Western Germany) has given way to a more cautious approach to the problem.

The general economic and trade situation would thus seem to make for a favorable outlook for the consumption of agricultural products both food and feed as well as such raw materials as fibers and tobacco, in 1953-54. While in the policy field basic restrictions continue on trade and the free operation of the markets, some countries have taken useful steps toward significant relaxation which should benefit trade as well as consumption.

Policies: In the United Kingdom the decontrol of consumption and trade is gaining momentum. Lower extraction flour and white bread may now be freely produced. Sugar and eggs have been derationed and by next summer all controls on food consumption will be removed with the complete derationing of meat and bacon, butter and cheese, as well as fats and oils. As the process develops, further moderate increases in retail prices are expected, but physical volume of consumption is unlikely to decline and may even increase.

The system of consumer subsidies will gradually be transformed into direct subsidies or deficiency payments to domestic producers, within the framework of domestic marketing schemes, to implement the policy of restoring the free functioning of the markets. The grain and feed trade was returned to private channels in 1953, feed rationing was eliminated, and it is contemplated to restore private trading during 1954 in livestock and meat, both home-produced and imported, with arrangements still to be worked out for bacon and meat imported under existing Government contracts.

Dried fruits were decontrolled on December 1, 1953, and arrangements made to have the Ministry's remaining stock marketed through private trade channels. The fats and oils trade will also be returned to private hands in 1954. Finally, the intentions of the Government regarding decontrol of the raw cotton trade are to give access to cotton from all sources, including the United States, in order to make it possible for a private futures market to reopen. The Raw Cotton Commission will cease to provide "cover" for the industry at the end of August 1954; the Commission is expected to cease trading in cotton at the same time and will be discontinued at the earliest possible date thereafter. Foreign exchange controls for imports from the dollar area in general, however, remain.

In Western Germany, where a market economy was well restored within the limits of traditional agricultural protection, the most significant recent policy measure affecting agricultural imports was the reduction in the consumption tax on cigarettes. The measure resulted in an upsurge of consumption from which imports of tobacco from the United States and other sources benefited. The Netherlands Government abolished the rationing of imported feedstuffs and returned that trade to private channels. Plans were announced for state trading to cease in 1953-54 for wheat, fats and oils. Belgium continued its compulsory admixture of domestic wheat flour, but rates of flour extraction were somewhat reduced at the beginning of 1953-54.

On the less favorable side in policy trends were the measures taken in France in the autumn as a result of surplus developments and farmer price squeezes. The Government announced its intention to keep out imports so far as practicable and to subsidize exports of agricultural products. In a series of decree-laws issued in September the Government proposes to deal with the problem by establishing the framework for an organization and regulation of markets. An agricultural fund is to operate general market equalization measures through storage policies; levies and subsidies. Immediate relief was organized for the meat surplus by the establishment of a separate fund and purchase of 30,000 tons of meat for temporary storage, army supply and eventual export to the United Kingdom.

There has also been much discussion in Italy regarding the direction of foreign trade - not, however, because of an acute farm price problem, but rather as a result of less favorable developments in the balance of payments. Among measures to cope with the trade imbalance, consideration is being given to the possibility of shifting Italian import purchases to countries that will accept larger Italian exports.

Trade: Imports of wheat and coarse grains into Western Europe in 1953-54 will not be above and may be below 1952-53. A larger share is likely to come from soft-currency sources, although there is some indication that initially countries have over-estimated that share. Thus, for example, it appears that Germany cannot obtain its total programmed amount of wheat from Turkey, despite that country's substantial surplus; availabilities by grades and qualities limit the movement. A similar situation appears to exist in the case of raw cotton.

Import demand for deciduous fruit during 1953-54 should be larger than a year earlier because of the high level of consumer buying power and the lower domestic output. With good crop prospects for oranges and lemons in both Spain and Italy, these countries will be large exporters, and importing countries are likely to continue their expansion of citrus consumption. In fact, a glance at present per capita levels indicates that there is still considerable room for expansion in a number of countries. In Sweden, Denmark, Western Germany and France per capita consumption of citrus fruit is from two to three times the prewar level - while the United Kingdom, Belgium, Norway, and other countries are below or only slightly above the prewar level, even if the increase in citrus juices is taken into account. There should be possibilities for private enterprise to seek out chances for an increase in citrus or citrus product intake in some of the European importing areas - with assistance at the government level to deal with the more general factors and policy angles of such efforts.

In view of the low stocks of United States tobacco in the United Kingdom, it is probable that that country will enter the American market on a larger scale in 1953-54, compared with small imports in 1952-53. General import demand for tobacco by the importing countries of Western Europe should also remain high under the influence of improved consumer buying power (and, for example, tax reduction in Germany). It is not improbable, however, that the share of imports of Oriental tobacco will continue to rise in some countries. Relatively high United States prices, the devaluation of the Greek currency in April 1953 and the probable maintenance of Turkish monopoly prices at competitive levels support this view.

The low level of Western European imports of raw cotton during 1952-53 is likely to extend into 1953-54. Price competition from non-American growths through the first half of the season has been keen because of large carry-over stocks in exporting countries and despite a slight decline this year in cotton production outside the United States. However, because of a large United States crop world production in 1953-54 has been slightly larger than 1952-53; United States acreage allotments and marketing quotas will take effect in 1954. Textile activity abroad continues generally favorable, but with uncertainty over future price policies of the United States, trade commitments now are largely short term.

Note on East-West Trade: Discussions have continued in unofficial circles as to the possibilities for increased east-west trade in Europe as well as outside Europe. The question has taken on added interest as a result of the "new economic policies" emerging in the Iron Curtain countries. Not only speeches but also some actions by the Communist Governments of the Soviet Union and Eastern Europe

indicate that consumption and output for consumption will be allowed to expand at the expense of investment. The noticeable modification of the totalitarian farm policies, providing for somewhat greater incentives to producers, is part of this policy line. Increased agricultural production as a result of the modification in farm policy would not necessarily mean increased exports from Eastern Europe, since expansion of general consumption would mean increased local demand for food. It might also mean increased import demand for products such as fats and oils, cotton, meat, fruits, and tobacco in Eastern Europe and possibly also in Western Europe for manufacturing or transshipment to the East. Butter markets in Western Europe were strengthened by Soviet purchases in 1953.

EASTERN EUROPE

Production: The 1953 harvest in the Danubian countries of Eastern Europe (Hungary, Rumania, Bulgaria and Yugoslavia) was much better than in 1952, when the crops were adversely affected by a severe drought. The total production, however, did not equal that of the excellent 1951 year. The yields of small grains in 1953 were very good throughout the area, but corn yields were below average in Hungary and poor in Rumania. The smaller acreage in Hungary also reduced the outturn of grains, especially wheat.

In Czechoslovakia, grain production seems to have been about the same as in 1952, but in Poland and Eastern Germany it was definitely less. Sugar beets and potato crops were above the very low level of 1952 in both Czechoslovakia and Poland. Eastern Germany also produced more sugar beets than in 1952 but had a smaller potato crop. Over-all production of grains and potatoes in Eastern Europe in 1953 did not reach the prewar level, but output of sugar beets and oilseeds was above prewar.

In a majority of countries cattle numbers are below prewar, whereas hogs are either at prewar or above. With the heavy emphasis placed by the governments on mechanization, horses are fewer than prewar in all Eastern Europe.

Policies: During the last two years increased difficulties were experienced in agricultural sectors of the Communist-controlled Eastern European countries due to collectivization--now intensified, now relaxed--and other Communist government policies unfavorable to independent peasant farming. Anti-peasant government policy coupled with poor crops produced serious food shortages in the winter of 1952-53 in a number of these countries. In the summer and fall of 1953, following the Soviet lead, a "New Course" in agricultural policy was proclaimed in all Soviet-dominated Eastern European countries. In Yugoslavia it was adopted even earlier. Collectivization is not to be discontinued, but its pace is to be slowed in order to consolidate the existing collectives. More help is to be given to the small peasant farmers in the form of tax relief, larger credits and more lenient policy with regard to compulsory deliveries. Collectives will continue to receive preferential treatment. Agriculture as a whole is to receive a larger share of total investment than hitherto, and an increased supply of industrial goods is intended to elicit greater efforts on the part of the peasantry.

Domestic Consumption and Exports: Better crops in 1953 and somewhat more lenient government policies may create some improvement in the domestic food situation during the present winter and spring in the Danubian countries of Eastern Europe. Small quantities of grain and other products may be exported. There is, however, little prospect of any considerable export of food and feed to the West from this formerly important surplus-producing area. It is significant in this connection that Yugoslavia, which exported before the war a yearly average of about 6 million bushels of wheat, joined the International Wheat Agreement in July 1953 as an importer, indicating import requirements of over 11 million bushels annually. Some corn may be exported, however, as in prewar years. The outlook for the 1954 harvest of fall sown grains in Yugoslavia is not favorable due to lack of rain in the principal grain producing regions during the period of germination. Similar conditions probably exist in Hungary.

In Finland the breadgrain crop was 14 percent less than in 1952, due to a substantial reduction in acreage, and the potato crop was 7 percent less, due to blight. However, because of the existence of ample grain stocks, it was possible to reduce wheat imports from the Soviet Union. The production of feed grains was 20 percent above 1952 as a result of increased acreage and yields. Thus the food and feed supplies situation is satisfactory.

SOVIET UNION

The Soviet agricultural situation in 1953 was characterized by smaller acreage increases, except for wheat, than during the preceding years; by spotty yields of crops; by continued unsatisfactory livestock progress; by a further reduction of food prices in Government stores; and by a number of important Government decisions on agricultural policy, charting the course to be followed by Joseph Stalin's successors.

Crops: It was officially reported that in 1953 wheat acreage increased considerably compared with 1952. The sugar beets, oil seeds, and forage crops acreages, as well as the total crop area, were expanded, but no figures were given. The goals established for flax and potatoes by the Government plan were not fulfilled. It is reasonable to infer that the increase in the total 1953 crop acreage was much less than the 7 million acres increase reported in 1952.

The 1953 wheat area was reported as 20 million acres above prewar (presumably 1940), or 119 million acres. Since the total grain area in 1953 was below prewar, the expansion of wheat doubtless took place at the expense of other crops, primarily its chief competitor, rye. Thus, not only was the wartime decline in wheat acreage made up, but it actually reached an all-time record, even though production of other crops suffered.

A comparison of the 1952 crop area with the prewar, shown in the table below, which should hold essentially for 1953, reveals a decline in the proportion of grain crops, a slight increase in industrial crops (fibers, sugar beets, etc.), a slight decrease in potatoes and vegetables, and a substantial increase in fodder crops, including sown grasses (tame hay). However, the effect of the considerable expansion of forage acreage was largely offset by low yields.

1/
Distribution of Sown Crop Area in the USSR for Specified Years.

Crop	1938		1940		1952	
	Percent		Percent		Percent	
	Area	of total	Area	of total	Area	of total
	Million		Million		Million	
	acres		acres		acres	
Total grains						
& legumes	253.0	74.8	273.1	73.5	265.1	68.9
Industrial crops	27.2	8.0	29.0	7.8	31.5	8.2
Potatoes & other						
vegetables	23.3	6.9	25.0	6.7	24.6	6.4
Fodder crops 2/	34.8	10.3	41.6	12.0	63.5	16.5
Total	338.3	100.0	371.6	100.0	384.7	100.0

1/ Boundaries of year indicated: 1938, prewar; 1940 territory closely approximates 1952 territory.

2/ Includes tame hay.

Based on official sources.

Unlike previous years, no official statement on the size of the 1953 grain crop has been reported thus far. However, the Soviet practice of reporting large estimates of the so-called biological, unharvested crop, which do not take into account considerable harvesting losses, was officially criticized and presumably is to be discontinued. It appears that the yields of grains and most other crops in 1953 were affected adversely in many regions by a drought during the growing period in the summer and by unfavorable

harvesting weather. However, due to increased acreage, wheat production may not differ materially from that of last year. But indications point to smaller crops of feed grains, potatoes, and possibly rye. The sugar beet crop may be somewhat larger than in 1952 because of some increase in acreage and more timely harvesting. A good cotton crop was apparently grown in 1952, but harvesting difficulties may reduce the quantity and quality of the crop.

Livestock: The livestock situation continued to be the weak spot in Soviet agriculture, as is indicated in the table below. The Soviet Government vigorously pushed the collectivization of livestock since the war. This program, however, resulted in an actual decline in total cattle numbers instead of the projected considerable increase and the non-fulfillment of goals for other types of livestock. Shortages of animal products was the inevitable result.

Number of Livestock in the USSR, January 1, Selected Years.

Year	Cattle		Sheep and		Hogs	Horses
	Total	Cows <u>1/</u>	Goats	Goats		
	Millions					
1916 <u>2/</u>	58.4	28.8	96.3	23.0	38.2	
1928 <u>2/</u>	66.8	33.2	114.6	27.7	36.1	
1941	54.5	27.8	91.6	27.5	21.0	
1951 (goal)	65.3	na	121.5	31.2	15.3	
1951 (reported)	57.2	24.2	99.0	24.1	13.7	
1952	58.8	na	107.5	26.7	14.7	
1953	56.6	24.3	109.9	28.5	15.3	
1955 (goal)	65.9	29.2	144.4 <u>3/</u>	34.5	na	

^{1/} Included in total cattle.

^{2/} Winter figures not published previously and may not be strictly comparable with other years because of boundary changes.

^{3/} Goal for sheep alone: 127,400,000.

na - not available.

Source: N.S. Khrushchev's report in Izvestiya, September 15, 1953.

Food Prices: A reduction in retail prices of food products sold in Government stores, which constitute the principal retail outlet in the Soviet Union, was ordered by the Government on April 1, 1953. This was the sixth consecutive year that such a reduction in prices took place in the spring. Prices of foodstuffs, however, are still considerably above the prewar levels, as is shown by prices of selected products in table on following page. Sufficient supplies of various foodstuffs were not always available at state stores, making it necessary in such cases for the public to resort to purchase on the private (legal) market at higher prices. Shortages of meat, dairy products, fruits and vegetables, still occur, especially in state stores, and there appears to be considerable local variations in the availability of various foodstuffs. Information on the food situation in the more remote interior is scant.

Retail Food Prices in Moscow State Stores on Specified Dates.

		:	:	:	Dec.	:	1953
		:	:	:	1947	:	:
Item	:	1940	:	Jan.	:	Before	After
	:	Jan. 1	:	1948 1/	:	April 1	April 1
		:	:	:	Rubles 2/	:	:
Rye bread (black)	kg.	:	:	:	3.00	:	1.50 1.35
Wheat bread (white)	do	:	:	:	7.00	:	3.40 3.10
Beef, 1st quality	do	:	:	:	30.00	:	17.60 15.00
Sugar (lump)	do	:	:	:	15.00	:	11.90 10.70
Butter (sweet)	do	:	:	:	64.00	:	28.30-31.90 25.50-28.70

(1 kilogram = 2.2 pounds)

1/ Following abandonment of rationing.

2/ The value of the ruble cannot be stated accurately in terms of U. S. currency. The official exchange rate has been fixed at 25 cents U. S. currency per ruble. This rate, however, does not represent the true purchasing power of the ruble nor does it reflect its depreciation since the beginning of World War II.

Agricultural Exports: Disposal of the crops to domestic consumption needs, stockpiling and exports, depends primarily on the decision of the Soviet Government, which has a monopoly on foreign trade and controls the internal distribution and reserve stocks. Small grains, principally wheat, have long constituted the traditional Russian agricultural exports. Before World War I, Russia was the principal competitor of the United States on the world wheat market, but since that time Russian grain exports have been small. The export commitment thus far during the current season includes between 11 and 12 million bushels of wheat to be shipped to Italy, Denmark, Norway, and Finland; 2.6 million bushels of corn to France; 1.4 million bushels of barley and 790,000 bushels of rye to Norway, and, as yet, unspecified quantities of wheat and barley to India. There were also substantial shipments of grain to Czechoslovakia and the Soviet zone of Germany. The Soviet Union supplies most of the raw cotton requirements of the Iron Curtain countries. Wool, cotton, citrus fruit and butter, are the more significant agricultural imports.

Policies: Beginning with August 1953, a number of important speeches by high Soviet officials and decrees dealing with or bearing on the agricultural situation were published. The weaknesses in Soviet agriculture, particularly with respect to livestock, potatoes and vegetables, were revealed. Among the more important decisions was the limited encouragement by the Government of private farming by members of collective farms on their kitchen garden plots, especially livestock breeding. This, however, is to be done without impairing the basic structure of collective farming. Some other limited economic concessions were made by the Government also, such as reduction of taxes and of compulsory delivery quotas for animal products on private holdings of collective farmers and workers, cancellation of arrears on such deliveries, the increase of prices for compulsory deliveries of animal products, potatoes, and vegetables, reduced compulsory delivery quotas of potatoes and vegetables by collectives and their members, and increased prices to be paid for farm products purchased in excess of the compulsory quotas. The low prices on compulsory grain deliveries, however, the most important agricultural product, are not increased.

Capital investment in agriculture is to be increased to provide more machinery, tractors, and especially the much needed commercial fertilizer. Tree shelterbelts in the semi-arid steppes and irrigation projects involving a large use of resources and some other farm practices, much emphasized during the Stalin regime, are receiving considerably less attention. The important role of machine-tractor stations in Soviet agriculture is to be further enhanced, and a campaign has begun to transfer technicians and skilled labor from industry to machine-tractor stations and collective farms. This campaign, however, is apparently meeting with many obstacles. The Communist Party control over collective agriculture is to be tightened. Measures also are being taken to increase the supply of manufactured consumers' goods and to improve the distribution in the countryside. Despite the limited encouragement of private farming, the decisions and measures taken by the Government do not represent, on the whole, a significant departure from the previously pursued policy with respect to collective agriculture. Serious complaints of delays in the implementation of the new policy decisions were voiced early in December, 1953, by N. S. Khrushchev, the Soviet leader who appears to be chiefly responsible for agricultural policy.

MIDDLE EAST

Agricultural production in Middle Eastern countries in 1953 was substantially greater than during 1952. Grain production in particular was very favorable in nearly all important cereal areas. Livestock products were also in greater supply because of relatively abundant forage and feed grains. Vegetables and garden crops were about equal to the above-average harvests of last year, while fruit production, especially citrus, was well ahead of 1952. Cotton yields were also higher, but because of sharp acreage reductions in 1953, particularly in Egypt, production was considerably under that of 1952. Tobacco crops in most countries also were below last year but in Turkey, the major producing area, both acreage and yields were greater than in 1952, and the Turkish crop was 30 percent above last year and established a new record.

Cereals are the most important crops grown in the Middle East and a substantial increase in their production occurred in 1953. Countries with export surpluses experienced difficulty in disposing of their grain because of large world supplies and storage facilities at most terminal points have been filled to capacity.

Turkey reported a record-breaking wheat crop of 7,500,000 metric tons, exceeding by 15 percent her production in 1952. The large Syrian wheat harvest of 750,000 tons provided an export surplus of 200,000 tons. Adequate moisture resulted in satisfactory yields of other cereals in Syria.

The harvest of 550,000 tons of wheat in Iraq was at least 50,000 tons in excess of domestic requirements, and the barley crop, one of the largest in recent years, is expected to leave 500,000 tons available for export. Likewise in Iran, substantial surpluses of grains are available from the 1953 harvest in spite of steadily climbing consumer demand. Egypt also had a record cereal harvest, with rice production estimated to be close to 400,000 tons of milled rice. About 15 percent over last year. The quantity still will be insufficient to cover the 1945-49 average consumption of 482,000 tons. Total cereal production is expected to provide 90 percent of consumption requirements in 1953-54. Government programs for imports, however, point toward smaller purchases abroad, so that per capita availability of food grains for 1953-54 has not changed materially.

Exports: Finding a market for exportable cereals is a problem of considerable degree in all of the grain surplus nations of the Middle East. The Turkish Government's efforts to attain the monthly export goal of 200,000 tons of wheat have so far been unsuccessful. Contributing directly to marketing difficulties are irregular export sales commitments which have prevented the maximum use of storage, transportation and shipping facilities for the full 12-month period. The Governments of Syria and Iraq are faced with the difficulty of trying to sell grains of varying quality at relatively high prices on a falling world market and in the face of sharp competition.

Livestock: Conditions which favored the excellent 1953 food cereals likewise resulted in relatively abundant supplies of feed grains and forage. Livestock and livestock products were in good supply, and at moderate prices, in all countries except Israel and Jordan. In these two countries, the prolonged dry spell caused severe hardship to the inhabitants of the southern portions, and the United States sent 9,500 tons of wheat to alleviate distress in Jordan. Meat continued in very short supply in Israel, and the Government has been forced to impose a system of severe rationing of meat products.

Fruits and Vegetables: The production of fruit and vegetables was above normal throughout most of the Middle East countries in 1953. This was particularly fortunate for the Levant countries, since by exporting fruit, especially citrus, they were able to purchase from nearby nations products in which they are deficient. Lebanon, however, intends to buy most of its wheat for the second year from IFA sources rather than Syria because of price and quality advantages. Date production in Iraq, while about 20 percent less than in 1952, will still permit exports of about 180,000 metric tons.

Winter grain outlook: Present indications are that areas planted to winter grains for harvest in 1954 will approximate that of 1953, but final output, especially in the semi-arid regions, will depend largely on winter rainfall. The Central Highlands of Turkey were quite dry when winter wheat was seeded in November. If normal conditions prevail, local agricultural surpluses are again likely to occur, except in the traditionally deficit nations of Saudi Arabia, Lebanon, Israel and Egypt.

THE FAR EAST

Agricultural production in the Far East made material recovery in 1953. With one or two exceptions, favorable weather during the growing season resulted in good crops in all the countries of the region. Larger rice crops are being harvested in all countries of Asia that usually have surpluses for export, and also in some that have rice for export only occasionally. On the other hand, the rice crop of Japan was the smallest in many years, as a result of excessive rains during the ripening and harvesting period.

The demand for cereals from outside the region will continue high during the coming months but the seller's market in rice, which has prevailed since World War II, appears to have disappeared for the time being. Rice export prices have been slow to reflect the changed situation and large year-end stocks of poor quality 1952 - grown rice have accumulated in both Burma and Thailand.

Cotton production was 4 percent greater than in 1952 and approximately equal to prewar. Tea production continued steady. On the other hand, less copra and Jute were harvested.

Policies: Although a high and effective demand for imported foodgrains has continued during the closing months of 1953, larger world supplies and declining prices of several foodgrains have led to revisions in the food policies of a number of countries. India eliminated the subsidy on foodgrains and Ceylon increased the Government foodgrain ration and eliminated the subsidy in July 1953. Pakistan also eliminated its subsidy on wheat. The situation, therefore, is one of relatively large supplies of food in the region but domestic prices have tended to remain stable rather than to reflect the decline in world markets.

Commercial crops such as cotton, tea, copra, jute and abaca are important foreign exchange earners to several countries in the region. Although prices for these commodities, which declined sharply during 1952 and early 1953, have stabilized, successful marketing of current supplies necessitates continued consideration of national policies relative to export duties, production controls, price supports and trade agreement.

Crop Production and Exports: In the 3 great rice exporting countries of Southeast Asia--Burma, Thailand and Indochina--total 1953-54 production is estimated at 15.6 million short tons of milled rice compared with 14.2 million last year and 13.9 million tons prewar. Burma's rice acreage was larger than in the preceding season by 500,000 acres and above average yields per acre are indicated. Rice acreage was extended substantially also in Indochina but, with yields reduced by drought, total production is expected to be only slightly above last year. The Thailand crop amounted to a record breaking 5.9 million tons of milled rice. These three countries will have considerably more rice for export from the 1953-54 crop than was available from last season's crop, and considerably larger than from any crop since the war. In addition it now appears likely that there were about 1.2 million tons carried over from last year making a total exportable surplus of about 4.7 million tons of milled rice.

In India the 1953-54 harvest is expected to show an increase of 2 million tons for coarse grains and at least another 2 million tons for milled rice. Prospects are also favorable for the currently growing winter crops such as wheat, barley, and chickpeas. The production of foodgrains in 1952-53 totaled 56 million long tons including pulses. Peanut production was well above 1952. There was a marked gain in flaxseed output and a small increase in castor beans. The increased 1953-54 production is attributable almost entirely to the exceptionally good monsoon rains during the growing season.

Because of the good crops there has been less restriction on the internal movement of foodgrains but per capita consumption is still low. During 1953 some 2 million long tons of grain were imported but imports may be slightly lower in 1954. India, the most important cotton growing country in the Far East, expects to produce about 20 percent more cotton in 1953-54 than in the previous season or around 3,650,000 bales (of 500 pounds gross). Imports, which averaged 833,000 bales for the preceding 5 years, will probably decline to about one-half this amount as a result of the large domestic crop. Jute production was a fourth below 1952.

Pakistan in 1953-54 is expected to harvest the largest rice crop in 5 years. The acreage devoted to rice has increased steadily. An exportable surplus larger than last season is expected from a total crop of about 10 million tons of milled rice.

The 1952-53 wheat harvest, due to drought and shortage of water for irrigation, amounted to only 2.4 million long tons, compared with an average of the previous 5 years of 3.7 million. To avert famine it was necessary to plan imports of 1.2 million tons of wheat, of which the United States agreed to supply 700,000 tons as a gift. Since there has been ample rainfall for the 1953-54 crops, the production of wheat and all other grains is expected to be average or above, and imports of wheat will probably be insignificant in 1954.

The 1953-54 cotton crop is estimated at about 10 percent below the record crop of 1.5 million bales in the previous season. More than a million bales of cotton will probably be available for export. Cotton exports to Japan are subject to a bilateral trade agreement under which Pakistan agrees to purchase Japanese textiles in quantity. The Pakistan Government has recently made a large scale purchase in fulfillment of its obligation. Jute production was cut by nearly one-half to 1.0 billion pounds.

Ceylon's three major export crops, tea, rubber, and coconuts are expected to be average or above in 1953-54. Tea exports are expected to exceed 300 million pounds. Most of the rice and other food must be imported, and rice import requirements in 1954 will probably amount to 400,000 tons. As a result of a currently favorable rice supply position, Ceylon is diverting to Japan some 30,000 tons of rice bought from China.

Rice production in Malaya is estimated at 550,000 tons, milled basis, about the same as last year's crop. Rice imports during 1953-54 are expected to approximate 500,000 tons or slightly less than last year.

Philippine rice production is expected to reach an all-time high of 2.5 million tons of milled rice, slightly above the previous year. It appears unlikely that rice imports will be required during 1953-54. Corn production has expanded in recent years and is currently sufficient to supply domestic requirements. Sweet-potatoes and cassava are widely grown, and cassava production may be expected to increase slightly due to the Government's encouragement to substituting cassava flour in part for imported wheat flour. In 1953-54 sugar production is expected to be about 1.3 million short tons compared to 1.1 million tons last year. This amount of sugar will be adequate to meet Philippine domestic requirements and fulfill the export quotas. Copra production and exports during 1953-54 may be 10 to 15 percent higher than the season before, when the outturn was reduced by droughts and typhoons. Abaca production is forecast at 3 to 6 percent below 1952 as a result of overstripping during the previous harvest in an effort to save the fiber from plants damaged by typhoons. About 95 percent of the abaca output is exported. Shipments during the past 5 years have averaged 220 million pounds, a decline of 41 percent from the 1935-39 average. Approximately 200,000 tons of wheat flour will probably be imported.

In Indonesia the production of most food crops during the current season is better than last year due to more favorable weather and expanded acreage. Rice production is estimated at 6 percent above the previous outturn of 8 million tons of milled rice. Imports during 1953-54 are expected to be less than 400,000 tons or only about one-half as much as last year. Sugar exports probably will be higher than the 80,000 tons of the previous year, and copra exports are expected to exceed the low figure of 1953. Tobacco production amounted to 112 million pounds, about the same as the year before, but less than half the prewar average. Coffee production was about 60 percent of the prewar average but exports have dropped to less than one-quarter of the prewar level, indicating a substantial increase in domestic consumption.

In South Korea the harvesting of a bumper rice crop has just been completed. Latest estimates indicate production may reach a level of 2.7 million tons of milled rice. A good crop of summer grains was harvested last summer which, together with the substantial foodgrain imports in 1953, adds up to a favorable current foodstocks position. The Republic of Korea Government plans to export 150,000 tons of rice in 1954 and to import an equivalent amount of food in the form of barley and millet for Korean consumption.

Production of rice in Taiwan during 1953-54 is expected to reach an all-time high of 1.6 million tons of milled rice. About 100,000 tons of milled rice may be available for export. Sugar production in 1953 totaled over 973,000 short tons, the highest in 10 years and 70 percent above 1952 production.

In Japan the overall production of crops harvested in 1953 was below normal and well below the record level of 1952, as adverse weather conditions reduced the wheat and barley crops about 6 percent below 1952. The rice crop, now estimated at 7.7 million tons, milled basis, is 20 percent below the 1952 crop and will probably be the shortest rice crop since 1934. The cool and rainy days during the grain ripening season were particularly damaging. Production of sweet-potatoes, the second most important fall-harvested crop, is estimated at about 5.5 million long tons, and was also considerably below normal. Soybean output in 1953 was 18 percent below the preceding year. Silk cocoon production reached 105,000 long tons, slightly more than in 1952 but only one-third of prewar. Tea production was around 120 million pounds, about the same as prewar.

The Japanese Government plans to import about 2 million long tons of wheat, 1.8 million tons of rice and 950,000 tons of barley during 1953-54. Japan in 1953-54 is scheduled to import 2.2 million bales of cotton, about one million bales from the United States, compared with total imports of 2 million bales in 1952-53. Wool imports will be around 100 million pounds, scoured, slightly above last year.

CENTRAL and SOUTHERN AFRICA

Production: In Central and Southern Africa, south of the Sahara Desert, the 1953-54 prospects appear favorable and show improvement and recovery from the disastrous drought conditions that affected large parts of the South and East in 1951-52. Production of vegetable oils and quantities available for export will be larger than last year. Progress is being made in determining methods of combating the Swollen Shoot and Black Pod diseases of cacao, but production of cacao beans in 1953-54 will be lower than in the preceding season. Corn production may be slightly below last year but above average. Wheat production will be larger, tobacco and citrus production has continued to expand, and cotton production will be about the same in 1953-54 as in 1952-53.

The recent improvement in production reflects in part the postwar emphasis in many areas on increasing yields and quality of production by improved techniques. More fertilizer and improved seeds are being used, progress is being made in combating insects and diseases and improved methods of marketing are gradually being introduced.

In the Union of South Africa one of the largest agricultural producers in this area, the production and supply situation for 1953-54 is generally favorable. The wheat crop was adversely affected by dry weather early in the growing season but, because of increased acreage, production may not be greatly different from last year and will be above average. Stocks of wheat in the beginning of the 1953-54 consumption year, however, were low and imports during the year will have to be above average if normal consumption needs are met. Supplies of corn, the principal food, are above average because of last year's large crop and it is doubtful if imports will be needed in 1953-54. Early rains and good planting conditions were reported for the 1953-54 crop.

The 1952-53 citrus crop, marketed in April - November, 1953, was about 20 percent larger than the previous crop. Of a total production of 6.5 million boxes of oranges, it is estimated that 4.5 million were exported during the current season primarily to the United Kingdom and Continental Europe. It is expected that the upward trend in citrus production will continue and other exporters will face

increased competition from South Africa. The production of raisins is reported to be the largest since 1946. Stocks of Thompson seedless are expected to be large in 1954 as a result of price difficulties encountered in export markets in competition with the United States, Greece, Turkey and Spanish products.

A record sugar output of about 720,000 tons of sugar is expected in comparison with the previous record crop of 686,000 tons in 1950-51. Good spring rains aided the early growth of sugar cane during the current season and further increases in sugar production are likely in 1954-55. New drought-resistant types of seed have been extensively used and additional crushing facilities will be available for the new crop.

In spite of drought conditions in 1951 and 1952 and heavier than usual slaughterings in 1952 and early 1953, total livestock numbers were not materially reduced. Cattle and sheep numbers in particular showed slight increases above 1951 and are expected to continue upward in 1954.

The crop outlook in French West Africa for 1953-54 is generally promising with the exception of cacao. Peanut supplies at the beginning of 1954 were very large, and production in 1953 at 880,000 tons was 7 percent above 1952. Cotton and coffee production also are expected to increase in 1953-54 but cacao production is estimated at only 45,000 tons as compared with 67,000 tons in 1952-53.

In British West Africa 1953-54 cacao bean production is estimated to be much below last year. Most of the decrease will be in the Gold Coast crop which is estimated at about 17 percent below 1952-53. Some increased production and marketing of cotton and oil palms is expected in Nigeria in 1953-54 as a result of increased plantings in some areas and the construction of roads in western cacao regions and northern cotton sections.

Reports from Uganda indicate a record corn crop of 123,000 tons or nearly four times that of 1952 but shortages of grain and dairy products are reported in Kenya and Tanganyika. It is expected that the shortage of grains in these areas will be made up by imports of corn from Uganda. Tanganyika's wheat crop not only suffered from drought in some areas but also was ravaged at harvest time by swarms of birds to the millet crop was also reported from French West Africa. The 1954 cotton crop forecast for British East Africa indicates a production considerably higher than the past year. Production and yields are expected to be higher because of an increase in acreage in Uganda, the use of improved seed in many areas and the recent announcement of a higher price to be paid to African growers.

The over-all harvest situation in Mozambique is reported as unusually good. Moisture conditions were favorable in 1953 and grain harvests appear to be satisfactory in most areas. The peanut crop is excellent and cotton prospects are reported above last year. It is forecast that Angola will harvest a good bean crop, providing normal rainfall conditions prevail in early 1954, and exports will probably exceed last year by approximately 20 percent. The 1953-54 cotton crop on the other hand suffered from the lack of moisture in some areas and it is estimated that production will be about 24,000 tons or 25 percent below 1952.

Southern Rhodesia harvested a record tobacco crop in 1953 totaling 105 million pounds. An increased acreage was planted in 1953 and with increased irrigation and other favorable growing conditions the 1954 tobacco crop could be in excess of the minimum target of 125 million pounds set by the Rhodesia Tobacco Association.

OCEANIA

Australia: Drought has reduced the outlook for several commodities for 1953-54 particularly in northern Australia, Queensland and New South Wales, and has resulted in some loss of cattle in the most seriously affected areas. The expected wheat crop of 176 million bushels is about 10 percent below last season and slightly below the 1945-49 average, and the oats prospect also was reduced by unfavorable weather at planting time. On the other hand, barley acreages were increased about 14 percent because of the good prices received for last season's crop. A record sugar crop has been reported for 1953-54 and exports under the terms of the British Commonwealth Sugar Agreement are expected to total about 780,000 tons.

Weather and growth conditions for fruit crops have been favorable. Exports of oranges during the early part of the season beginning in July were almost 50 percent above those of the previous year and production of lemons and grapefruit, some of which will be available for export, is also above last year. The dried fruit industry has continued to expand in the postwar period under the stimuli of guaranteed exports and prices to the United Kingdom and the entire exportable surplus will again be taken in 1954. The future of that market, however, will be largely dependent upon the price support policy, if any, that may be adopted by the Australian Government as the United Kingdom's future imports of dried fruit have been returned to private trade channels.

The production of some meats has been affected by the drought and in the 1953-54 season may be somewhat smaller than the year earlier. Price revisions in the Australian-United Kingdom meat contract for the current season provide a premium price for young beef which is expected to encourage a shift to the production and marketing of younger animals and to improve the quality of Australian meat exports. Livestock producers are also very much concerned regarding prices to be paid for meat imports by the United Kingdom when trade in this item is returned to private channels, probably in 1954. Dairy production during the 1953-54 season, with the exception of butter, is expected to be about the same as last year but butter production will decline because of the drought.

Wool production during the past two years reached a new record in 1953-54 of 1,310 million pounds, or 25 percent above the 1946-50 average. This marked increase in output is attributed to improved pasture conditions in the wool growing area, a large part of which is due to the success of the myxomatosis program for the eradication of rabbits. Wool market prospects for 1953-54 were favorable during the first half of the marketing season, due partly to Russian purchases and more buying by the Japanese than was originally anticipated.

New Zealand: The general trend of agricultural production in New Zealand is upward and current conditions point to a continued high level of production in 1954. Excellent weather and pasture conditions were a major factor in expanding dairy production for the year ending June 1953, which was well above 1951-52 and set a record for the fourth consecutive

season. Less favorable weather during the early part of the new season, however, may result in a slight decline in dairy production in 1953-54. Meat production declined slightly in 1953 due to expansion of breeding herds but it is expected that production will be up about 4 percent in 1954. Wool production continued its upward trend in 1953 and exceeded the 1946-50 average by 13 percent.

The acreage planted to wheat in New Zealand continues to decline and a further reduction occurred in the crop planted for harvest in early 1954. With average yields, the 1954 crop will provide only about a third of consumption requirements. The area in coarse grain crops has remained fairly stable and favorable conditions permitted some exports in 1953. Smaller plantings were made, however, for 1954, because of the low market prices received for the 1953 crop and the decline in the demand for oats for horse feed.

A normal apple crop is expected in 1954 but late frost damage probably reduced the stone fruit crop below average. About one million cases of apples and 35,000 cases of pears were exported during 1953 principally to the United Kingdom, but some small shipments were also made to Europe and North America.

Climatic conditions and other factors favor pastoral agriculture in New Zealand and recent developments indicate a further expansion in livestock production. Breeding herds and flocks are building up and better pasture management is being practiced which is expected to be reflected in higher meat production within the next few years. The land taken out of wheat and other grain production is being planted to improved pastures and the government is bringing into cultivation each year about 40,000 acres of new land in addition to new acreages brought under improved grasses by private individuals. Existing pastures are also being improved by the wider use of fertilizers and aerial topdressing on hill country pastures. Meat, dairy products, and wool have been and will likely continue to be the major exports of New Zealand and the expansion of the livestock industry will increase the position of these products in world trade.

THE SITUATION BY COMMODITIES

GRAINS

World grain production in 1953-54, although slightly below last year's record, is on a very high level. The estimates indicate a record rice crop, a wheat crop about 3 percent below last year's record, a corn crop only slightly below last year's near-record, and barley and oat crops also below last year but well above average. On the other hand rye production was below 1952-53 and the prewar average outturn.

The small reduction from the 1952 record wheat production was primarily due to moderate reductions in the United States and Canada. The decline in the United States corn crop was largely offset by increases in Europe. Larger rice crops are reported from all major exporting countries, particularly in the "rice bowl" of Asia -- Burma, Indochina, and Thailand. Outturns in the major importing countries, except Japan, were also favorable.

This season's favorable crops of bread and coarse grains in the major exporting countries (United States, Canada, Australia, and Argentina), together with large carry-over stocks on July 1, 1953, provide ample supplies to meet import requirements in deficit areas. Total import requirements in 1953-54 may be considerably reduced because favorable bread and coarse grain crops were harvested in most of the principal importing countries. Even though the export availabilities of rice, especially in the Far East, are considerably above a year ago, there is still an active import demand for good quality rice.

Price Movements: Grain prices in general declined during last season and in the current season to date, reflecting the effects of large supplies. The maximum IMA price for wheat, \$2.05 per bushel, is higher than in the previous agreement but wheat sales being reported under the agreement are generally much below this maximum.

Breadgrains: World breadgrain (wheat and rye) production in 1953-54 is estimated at 254 million short tons, compared with last year's record of 263 million, and considerably above both the prewar and postwar averages. Rye usually accounts for only about one-fourth of the total breadgrain production but is important in the food supply of many areas, particularly Northern and Eastern Europe.

Wheat: The 1953-54 world wheat crop, estimated at 7,045 million bushels, is second only to last year's record crop, and 17 and 21 percent, respectively, above the prewar and postwar average. Production in each of the major exporting countries is somewhat below 1952 but export availabilities are at high levels, especially in the United States and Canada, both because of large 1953 crops and substantial carry-overs from the preceding season. Of equal significance, is the fact that large crops were harvested in most of the major importing areas, particularly Western Europe, thus reducing the usual import requirements.

In North America, the largest surplus-producing area, this year's crop is down 10 percent from the 1952 record. The Canadian crop, however, is second only to last year's unprecedented large harvest and the United States crop is the fourth highest of record. The South American crop of about 315 million bushels is expected to be much above average but somewhat below the large outturn last year. Argentina's crop is forecast at 225 million bushels, about 20 percent below the previous large crop.

Production in Europe is estimated at 1,700 million bushels, one of the largest crops ever produced in the area. Record or near-record crops were reported in a number of the principal countries of Western Europe, exceptions being noted for Spain and the Netherlands, where drought in the former and floods in the latter reduced crops significantly. The Australian crop of 176 million bushels is expected to be somewhat larger than reported earlier in the growing season but probably will be below the large output of the previous year.

Wheat Supplies Available for Export: The quantity of wheat available for export from the 4 principal surplus-producing countries (United States, Canada, Australia, and Argentina) are substantially larger during 1953-54 (July-June) than the 838 million bushels exported by these countries in 1952-53. The aggregate supplies in these four countries will be very high because of record supplies in the United States, near-record supplies in Canada, and substantial quantities in the other two countries. In the United States the total of 1,730 million bushels includes carry-in stocks of 562 million bushels. The supply in Canada amounts to 977 million bushels, practically equal to the record of 980 million in 1942-43. For the four major exporting countries combined the total supplies available for export during October, 1953 - June, 1954 and for carry-over into the next season totaled about 1,860 million bushels, 23 percent above the quantities available for these purposes a year earlier.

WHEAT AND FLOUR: Exports by major exporting countries,
1952-53 (July-June) with comparisons

Countries	: 1934-38 : : average :	: 1945-49 : : average :	: 1950-51 : : Million :	: 1951-52 : : Million :	: 1952-53 : : Million :
	: bushels	: bushels	: bushels	: bushels	: bushels
United States.....	45	405	365	475	317
Canada.....	175	278	221	350	392
Australia.....	106	93	127	100	100
Argentina.....	122	67	103	30	29
Others.....	101	62	104	105	1/ 97
Total.....	549	902	920	1,060	1/ 935

1/ Preliminary.

Import Requirements: While larger quantities of wheat are available for export this year, the total import requirements are less than last season, as a result of a better supply position in most of the major importing countries, notably in the world's major importing area of Western Europe. Large crops were reported from practically all countries in this area in 1953-54, except Spain and the Netherlands. Asia, the second most important outlet for the world's wheat exports, has had its third consecutive large crop. Although the estimate for Asia of over 1,600 million bushels is above the postwar (1945-49) average, import requirements are rather large in some Asiatic countries. Japan's requirements for 1954 amount to about 75 million bushels principally because of the poor rice crop. Pakistan's requirements in 1954 are likely to be very small in comparison with 1953 when about 27 million bushels of United States wheat were shipped or programmed to that country under an aid program.

In view of the better supply position in most importing areas, it appears that the total world exports of wheat this season may be some 10 percent or so below the approximate 935 million total of last season. United States exports are expected to be substantially below last season when they totaled about 317 million bushels. Canadian exports this season are likewise expected to be below the 1952-53 exports of nearly 400 million bushels.

Argentina's 1953-54 (July-June) exports will be considerably above the 29 million bushels exported during this period a year earlier. The current crop now estimated at about 225 million bushels, is below earlier expectations and about 20 percent below the bumper 1952 crop. Including shipments made since July 1953 from the old crop wheat, however, supplies should be sufficient to provide exports in excess of 100 million bushels.

Australia's total exports may be about the same as last season's shipments of 100 million bushels, although production of 176 million bushels is somewhat lower.

WHEAT AND FLOUR: World exports by specified geographic areas, 1952-53 (July-June) with comparisons (million bushels)

Period (July-June)	Destination of World Exports							
	North, Central:		and South		Asia 1/		Africa	
	Europe	America	Europe	America	Asia 1/	Africa	Total	
	% of : total:	Quan- : tity	% of : total:	Quantity : total:	% of : total:	Quan- : tity	% of : total:	Quan- : tity
1934-38 av. 2/3/...	73:	400:	15:	84:	10:	54:	2:	11:
1945-49 av.	61:	547:	13:	116:	21:	191:	5:	48:
1950-51.....	55:	505:	16:	143:	23:	210:	6:	57:4/
1951-52.....	50:	527:	16:	168:	27:	281:	7:	74:4/1,060
1952-53 5/.....	54:	505:	16:	150:	23:	215:	7:	65:4/ 935

1/ Includes shipments to Oceania. 2/ Calendar year. 3/ Does not include small quantities to "unspecified destinations." 4/ Includes small quantities to "unspecified destinations." 5/ Preliminary.

Rye: The world's production of rye in 1953-54 is estimated at 1,540 million bushels compared with 1,600 million bushels last year. This is slightly above the postwar average but nearly 200 million bushels below the prewar average. Over 95 percent of the crop is normally produced in Europe (especially Eastern Europe and the Soviet Union). Virtually all of the balance is produced in Canada, the United States, Turkey, and Argentina. The 1953 acreage was down in Eastern Europe and the Argentina crop was heavily pastured through the winter.

BREADGRAINS: World production, 1953-54 with comparisons

	Av. 1935-39	Av. 1945-49	1951-52	1952-53	1953-54 1/
	Million : bushels	Million : bushels	Million : bushels	Million : bushels	Million : bushels
Wheat					
North America.....	1,086:	1,585:	1,550:	1,999:	1,800
Europe.....	1,600:	1,265:	1,580:	1,640:	1,700
USSR.....	1,240:	885:	-	-	-
Asia.....	1,498:	1,525:	1,610:	1,600:	1,610
Africa.....	143:	134:	160:	174:	190
South America.....	281:	263:	155:	370:	315
Oceania.....	177:	183:	164:	197:	180
World total.....	6,025:	5,840:	6,470:	7,280:	7,045

- continued

BREADGRAINS - continued

	Av. 1935-39	Av. 1945-49	1951-52	1952-53	1953-54 1/
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels
<u>Rye</u>					
North America.....	54:	35:	39:	41:	46
Europe.....	766:	565:	695:	675:	635
USSR.....	885:	895:	-	-	-
Asia.....	15:	15:	25:	28:	30
Africa.....	1:	1:	1:	1:	1
South America.....	11:	15:	4:	54:	28
Oceania.....	-	-	-	-	-
World total.....	1,732:	1,525:	1,665:	1,600:	1,540
	1,000 sh. tons	1,000 sh. tons	1,000 sh. tons	1,000 sh. tons	1,000 sh. tons
<u>Total Wheat and Rye</u>					
North America.....	34,092:	48,530:	47,592:	61,118:	55,288
Europe.....	69,448:	53,770:	66,860:	68,100:	68,780
USSR.....	61,980:	51,610:	62,700:	61,400:	59,900
Asia.....	45,360:	46,170:	49,000:	48,784:	49,140
Africa.....	4,318:	4,048:	4,828:	5,248:	5,728
South America.....	8,738:	8,310:	4,762:	12,612:	10,234
Oceania.....	5,310:	5,490:	4,920:	5,910:	5,400
World total.....	229,246:	217,900:	240,720:	263,200:	254,470

1/ Preliminary estimates.

Coarse Grains: World production of coarse grains (corn, oats, and barley) during 1953-54 is now estimated at 286 million short tons compared with 291 million in 1952-53 and the prewar average of 260 million. The all-time record was 292 million tons in 1948-49.

Corn is the most important coarse grain moving into export channels. The world production this year of 5.6 billion bushels is little different from last year's large crop. The record production of 6 billion bushels was produced in 1948; in the prewar period 4.8 billion bushels were harvested and in the postwar period 5.3 billion bushels. United States production this season, although still very high, was 103 million bushels below last year. However, this decline was largely offset by more favorable outturns in other areas, particularly in Europe.

Total supplies in this country of nearly 4 billion bushels are slightly higher than in 1952-53, 11 percent above the postwar average, and close to the all-time record supplies in 1949-50. It appears that Argentina's crop, which will be harvested in early 1954, may exceed the short last harvest of 135 million bushels, as acreage is somewhat higher. Consequently Argentina's export availabilities for the year beginning early in 1954 may be increased.

COARSE GRAINS: World production, 1953-54 with comparisons

	: Av. 1935-39 :	Av. 1945-49 :	1951-52 :	1952-53 :	1953-54
	: bushels :	bushels :	bushels :	bushels :	1/
Barley					
North America.....	332:	424:	507:	525:	518
Europe.....	666:	600:	755:	805:	815
USSR.....	425:	272:	-	-	-
Asia.....	768:	692:	760:	800:	815
Africa.....	121:	107:	128:	150:	145
South America.....	38:	53:	37:	78:	60
Oceania.....	13:	19:	25:	38:	42
World total.....	2,365:	2,170:	2,540:	2,745:	2,720
Oats					
North America.....	1,384:	1,720:	1,813:	1,738:	1,615
Europe.....	1,608:	1,293:	1,440:	1,400:	1,405
USSR.....	1,165:	720:	-	-	-
Asia.....	96:	84:	105:	110:	105
Africa.....	23:	20:	23:	24:	23
South America.....	62:	57:	41:	87:	57
Oceania.....	27:	37:	46:	56:	38
World total.....	4,365:	3,930:	4,190:	4,190:	3,970
Corn					
North America.....	2,435:	3,217:	3,110:	3,518:	3,384
Europe.....	695:	560:	690:	480:	620
USSR.....	170:	113:	-	-	-
Asia.....	620:	665:	670:	725:	695
Africa.....	575:	450:	390:	445:	495
South America.....	255:	265:	260:	310:	280
Oceania.....	8:	7:	5:	5:	6
World total.....	4,760:	5,280:	5,260:	5,640:	5,610
	: 1,000 :	1,000 :	1,000 :	1,000 :	1,000
Total Barley, Oats & Corn	sh. tons	sh. tons	sh. tons	sh. tons	sh. tons
North America.....	98,292:	127,772:	128,256:	138,912:	133,024
Europe.....	61,172:	50,768:	60,480:	55,160:	59,400
USSR.....	33,600:	21,212:	23,180:	25,140:	23,040
Asia.....	37,328:	36,572:	38,680:	41,260:	40,700
Africa.....	19,372:	15,488:	14,360:	16,444:	17,708
South America.....	9,044:	9,604:	8,824:	11,944:	10,192
Oceania.....	968:	1,244:	1,476:	1,948:	1,784
World total.....	259,880:	262,800:	275,280:	290,840:	285,880

1/ Preliminary.

Import Requirements for Corn: It does not appear that import requirements for corn will be as large as last year because of more favorable supply positions in the major importing areas, particularly in Europe which is the principal recipient of corn exports. Total European production is estimated at 620 million bushels, an increase of 140 million bushels over the small crop of the previous season. Import requirements in Asia, however, may be somewhat above last year as production appears to be below the 1952 total. United States exports of corn in 1953-54 probably will not be much, if any, above those of 1952-53 (126 million bushels) despite the large amount available. Argentina's exports, however, will be much above the 25-million bushel level of the past two seasons (July-June) as approximately this quantity had already been exported from July to November 1953.

World barley production of 2.7 billion bushels is very little different from 1952 but somewhat above the prewar and postwar averages. The world's oat crop of 4.0 billion bushels is slightly below each of the two preceding crops and 400 million bushels below the prewar average.

The bulk of the world's production of corn, oats, and barley is used for feeding livestock. With the 1953-54 combined production of those grains at high levels, and with large crops in the major surplus producing areas of North and South America, the quantities available for export during 1953-54 should be more than ample to meet the somewhat reduced world import requirements during 1953-54.

Winter Grain Prospects for 1954: Winter wheat acreage normally accounts for roughly three-fourths of the Northern Hemisphere total wheat acreage. In Europe, however, 90 percent or more is winter wheat. Conditions for fall seeding in Europe have been generally favorable although rains are badly needed in some areas. In Yugoslavia the condition of winter crops is low because of prolonged drought.

In the major exporting countries of the Northern Hemisphere, winter wheat acreage for harvest in 1954 is somewhat smaller than the 1953 acreage. The United States seeded acreage of 46.6 million acres is sharply below the 56.8 million acres seeded last year and reflects the 1954 acreage allotment program. Seeding conditions were mostly favorable although delayed to some extent because fall rains were late. Winter wheat is of minor significance in Canada. The area seeded this fall is 7 percent less than for 1952 and growing conditions were near average. Fall seeded wheat in Asia was reported in good condition in most of the areas for which information is available, except that dry weather is having an adverse effect in some areas.

Rice: World rice production in 1953-54 (August-July) will be somewhat larger than the preceding year's record of 125 million short tons of milled rice. Increased production is indicated for all continents. Larger acreages were sown in all regions except Europe, where favorable weather during the growing season resulted in yields that more than offset the acreage decline.

In contrast with a year earlier, when production increases occurred primarily in importing countries, this season's crops are also larger in countries that have rice for export. Most of the countries of Asia harvested more rice than in 1952-53. Outstanding factors in the world supply-demand relationship for rice are the large harvests in the surplus area of Asia - Burma, Thailand and Indochina, - and the short crop in Japan.

RICE (in terms of milled): Production by principal world areas, averages 1935-36/39-40 and 1945-46/49-50, annual 1951-52 to 1953-54

Area	Average				
	1935-36	1945-46	1951-52	1952-53	1953-54
	to	to		1/	1/
	1939-40	1949-50			
	1,000	1,000	1,000	1,000	1,000
	short tons	short tons	short tons	short tons	short tons
ASIA:					
Rice Bowl:					
Burma.....	5,489:	3,400:	4,060:	4,500:	5,040
Thailand.....	3,356:	4,192:	5,600:	5,094:	5,880
Indochina.....	5,039:	4,165:	4,480:	4,585:	4,725
Total.....	13,884:	11,757:	14,140:	14,179:	15,645
Other countries.....	98,069:	94,284:	94,545:	100,822:	99,592
Total.....	111,953:	106,041:	108,685:	115,001:	115,237
WESTERN HEMISPHERE:					
United States.....	729:	1,153:	1,488:	1,581:	1,668
Other countries...	1,483:	3,029:	3,422:	3,495:	3,811
Total.....	2,212:	4,182:	4,910:	5,076:	5,479
EUROPE.....	778:	715:	1,073:	1,213:	1,264
AFRICA.....	1,735:	2,710:	2,702:	2,639:	2,788
Other countries.....	529:	688:	866:	928:	1,001
World total.....	117,207:	114,336:	118,236:	124,857:	125,769
1/ Preliminary.					

Trade Prospects: Smaller quantities of rice were exported in 1953 than in 1952 for three principal reasons: (1) large crops were produced in most of the leading importing countries in 1952-53, (2) the quality of considerable amounts of rice was of inferior quality, and (3) prices of rice offered for export were considered too high by importers.

World rice supplies available for export in 1954 are larger than at the beginning of 1953 in all of the world's exporting countries, except Egypt. These are from large harvests in virtually all of the exporting countries, plus substantial carry-over stocks from the 1952-53 crops in Burma and Thailand. In all, about 7.8 million short tons of milled rice will be available, or 3 million tons more than the estimated exports in 1953. Of this quantity, however, 1.2 million tons are from carry-over stocks from the 1952-53 crops of Burma (770,000 tons) and Thailand (430,000 tons). Because of low quality, a large proportion of these carry-over supplies, especially in Burma, will have great difficulty in finding a market. In Burma, Thailand and Indochina, combined availabilities of 4.7 million tons are 2 million tons larger than exports in 1953. Export supplies in other countries of Asia, with the exception of Taiwan, are from areas that have rice for export only in years when good crops are harvested. These include a minimum of 300,000 short tons from China; 300,000 tons from Pakistan; 165,000 tons from Korea, and 100,000 tons from Taiwan. Total export availabilities are only 1 million tons less than the (1936-40) average rice exports, and are more than twice the reduced trade of the immediate postwar (1946-50) period.

Increased supplies are available from larger crops in the United States, Italy and Spain. The 1953 production of Egypt, although larger than the small harvest of the year before, again was not sufficient to permit exports. Larger exports may be made from Brazil than indicated in the following table, since it is still too early in the season to predict the outcome of the 1953-54 harvest. That country, however, will not have carry-over stocks from the preceding year for export.

RICE (in terms of milled): Exports in principal world areas,
averages 1936-40 and 1946-50, annual 1952, estimated
1953, and export supplies, 1954

Area	Average		1952	1953	1954
	1936-40	1946-50			
	1,000	1,000	1,000	1,000	1,000
	short tons	short tons	short tons	short tons	short tons
ASIA:					
Rice Bowl:					
Burma.....	3,268:	1,074:	1,462:	1,100:	2,400
Thailand.....	1,460:	960:	1,574:	1,400:	2,000
Indochina.....	1,616:	124:	249:	200:	300
Total.....	6,344:	2,158:	3,285:	2,700:	2/ 4,700
Other countries....	1,936:	71:	381:	435:	1,300
Total.....	8,280:	2,229:	3,666:	3,135:	6,000
WESTERN HEMISPHERE					
United States.....	118:	491:	872:	880:	900
Brazil.....	42:	161:	238:	0:	20
Other countries....	47:	135:	140:	192:	190
Total.....	207:	787:	1,250:	1,072:	1,110
EUROPE					
Italy.....	168:	89:	304:	440:	500
Other countries....	6:	9:	81:	83:	100
Total.....	174:	98:	385:	523:	600
AFRICA					
Egypt.....	138:	274:	18:	0:	0
Other countries....	17:	16:	52:	50:	60
Total.....	155:	290:	70:	50:	60
AUSTRALIA.....	15:	32:	22:	30:	30
World total.....	8,831:	3,436:	5,393:	4,810:	2/ 7,800

1/ Preliminary. 2/ Includes about 1.2 million tons of carry-over stocks from 1952-53, much of which is low in quality.

SUGAR

World production of centrifugal cane and been sugar during the 1953-54 season (May-April) is expected to total almost 39.0 million short tons, raw value, an increase of 8 percent over the previous crop and about 2 percent greater than the previous record crop of 1951-52.

The current forecast exceeds the 1945-49 average production by 42 percent and the prewar (1935-39) average by 37 percent. The production of noncentrifugal sugar (native type) is expected to total 6.7 million short tons, total, compared with 6.6 million tons in 1952-53. This forecast is 12 percent above 1945-49 and 24 percent above prewar.

While the world production of cane sugar continues at a high level, though slightly below 1951-52, been sugar production is expected to set a new high record. An increase in acreage and good growing conditions in Western Europe made possible an increased output there of 1.2 million tons more than the 6.0 million tons of last season. Eastern Europe expects to exceed the production of 2.3 million tons of last season by 700,000 tons.

The producing areas of the British Commonwealth are pushing output to higher levels under a Commonwealth Sugar Agreement which assures a market for larger supplies. The French Union, in similar fashion, has promoted expansion to the extent that it has reached self-sufficiency with the current crop.

In addition to the material increases in production in most of the world, importers and exporters alike hold large carry-overs from the previous season which are estimated at almost one-fourth the current production forecast. On the exporting side, Cuba has a reserve of 1.6 million tons from the 1951-52 crop which it expects to sell in the United States in the next few years; on the importing side, the United Kingdom is most important as the holder of Cuban raw sugar over and above normal year-end inventories. During the last half of 1953, the United Kingdom was to receive about 900,000 tons of a 1.1 million-ton purchase from Cuba. This purchase from Cuba. This purchase was made to meet the increased consumption expected from derationing of sugar which became effective in the last quarter of 1953.

The United States is assured of more than adequate supplies of sugar for the consumption year 1954. Not only is every major source of supply, domestic and foreign, in a position to fulfill its quota for the United States during the year, but the Cuban special reserve mentioned above is held for United States purchase.

CENTRIFUGAL SUGAR (raw value): Production in specified countries,
averages 1935-39, 1945-49, annual 1950-51 to 1953-54 1/ 2/

Continent and Country	Averages					
	1935-39:	1945-49:	1950-51:	1951-52:	1952-53:	1953-54
	1,000	1,000	1,000	1,000	1,000	1,000
	short	short	short	short	short	short
	tons	tons	tons	tons	tons	tons
United States and Territories	3,951	3,971	4,807	4,360	4,402	4,585
Cuba	3,183	5,897	6,349	7,964	<u>4/</u> 5,687	<u>4/</u> 5,679
Philippines, Rep. of	1,058	382	935	1,076	1,124	1,320
United Kingdom and British Commonwealth	4,541	4,792	5,921	5,993	6,183	6,796
French Union	1,384	1,006	1,860	1,711	1,472	2,096
Other North America	949	1,308	1,562	1,680	1,826	1,908
Other Western Europe	2,760	2,462	4,144	4,343	4,230	4,713
Eastern Europe including: U.S.S.R.	5,687	3,699	5,734	5,770	4,824	5,529
Other Asia	2,801	736	1,149	1,535	1,938	1,877
Other South America	1,905	2,801	3,345	3,507	3,963	4,042
Other Africa	307	373	398	384	413	422
Total Production	28,526	27,427	36,204	38,323	36,062	38,967

1/ Centrifugal sugar, as distinguished from non-centrifugal, includes cane and beet sugar produced by the centrifugal process, which is the principal kind moving in international trade. 2/ Years shown are for crop years; generally the harvesting season begins in the fall months of the year shown or in the early months of the following year, except in certain cane-sugar-producing countries in the Southern Hemisphere, such as Australia, Argentina, Mauritius, Union of South Africa, etc., where the season begins in May or June of the year shown. 3/ Preliminary. 4/ Restricted crops.

In summary, supplies are more than ample for current world requirements, despite the expected increase of 600,000 tons because of derationing in the United Kingdom.

International Sugar Agreement: Following the harvest of the large crop of 1951-52, an awareness of the trend toward over-production has induced the important exporters and importers to join hands more effectively in an attempt to stabilize the world sugar market. A new International Sugar Agreement, scheduled to go into effect January 1, 1954, was negotiated by representatives of 50 nations on August 24, 1953. To come into force the agreement required approval by December 15, 1953, of Governments holding 60 percent of the votes of importing countries and 75 percent of the votes of exporting countries. The Governments were required either to ratify the agreement or to give notice of their intent to seek ratification at the earliest possible date before the deadline.

The new Agreement is a multilateral export quota-type agreement. Recognized and excluded from the free market are imports made under preferential arrangements such as those provided for under the British Commonwealth Agreement, and the United States Sugar Act. The Agreement does not obligate importing countries to take specific quantities of sugar. To maintain free market sugar prices within a range of 3.25 and 4.35 cents per pound at Cuban ports, the Agreement provides for the expansion and contraction of sugar supplies exportable to the world free market through adjustments in export quotas. The price range can be modified by the administrative body under the Agreement.

World supplies of fats and oils in 1954 may be at a record high, while per capita supplies will be essentially at the prewar level. This takes account of the carry-over of stocks from 1952 and earlier years. Supplies are in better balance as between dollar and soft-currency areas than a year earlier, though there is a large surplus in inventory of vegetable oils in the United States while Argentina holds a considerable quantity of linseed oil. Also, large stocks of carried-over peanuts are awaiting movement from West Africa, where lack of inland transportation facilities continues to hamper exports.

The highlights of production in 1953 were the substantial increase in olive oil in the Mediterranean Basin, and the gains in the output of peanuts, soybeans, and palm oil and kernels in Asia and Africa. Production of castor beans and tung nuts in South America was higher. In the United States increases occurred in the output of inedible tallow, flaxseed, cottonseed, butter, tung nuts and castor beans.

World production of fats and oils in 1953, including the oil equivalent of oilseeds and tree-crop materials grown and harvested in 1953, was about 26,745,000 short tons, 2 percent higher than 1952, and 13 percent above prewar. This tonnage is second only to the record output of 26,810,000 tons in 1951.

FATS AND OILS: Estimated world production by type,
average 1935-39, annual 1950-53

(1,000 short tons)

Type	: Average : : 1935-39 :	1950	1951	1952 1/	1953 1/
Edible vegetable oils...	7,060	7,485	8,960	8,050	8,710
Coconut and palm oils...	3,630	3,735	4,010	3,830	3,795
Industrial oils.....	2,900	3,194	3,070	3,284	3,210
Animal fats.....	9,030	9,520	9,760	10,040	10,140
Marine oils.....	1,055	860	1,010	975	890
Total.....	23,675	24,794	26,810	26,179	26,745

1/ Preliminary.

Note: The production of fats and oils in a given calendar year, as estimated here, is to a large degree that which is available for consumption and trade in the following year. Thus, in addition to the animal fats and marine oils actually produced, the total figure for any given year includes—less certain allowances for seed, feed, and food uses, as well as losses—the oil equivalent of the oilseed and tree-crop oil materials grown and harvested in the Northern hemisphere, and the oil equivalent of oilseed and tree crops grown in the Southern hemisphere whose harvests normally begin before the close of the calendar year.

Production in 1953 of the edible vegetable oils, ranking next in size to the animal fats group, was up substantially from 1952. This was due chiefly to the gains in the outturn of peanuts--primarily in India and China-Manchuria--and the 50-percent increase in Mediterranean Basin olive oil production from the "off-year" outturn in 1952. The indicated increase in the Chinese-Manchurian production of soybeans was about sufficient to offset the sharp decline in the United States crop. For the most part the oils in this group from the oilseed and olive crops harvested in 1953 will become available for consumption in 1954.

The outturn of the oils in the palm group in 1953 was down slightly from 1952. While coconut oil production was off--owing to sharply smaller output of copra in the Philippines, Indonesia, and Ceylon during the first half of the year--availabilities of palm oil and kernels, mainly from Africa, were up from a year earlier.

Industrial oils production in 1953 also was down slightly from 1952. This was due chiefly to a decline in the outturn of rapeseed, primarily in Sweden, France, and India. Although total output of flaxseed was slightly below 1952, there were substantial gains in production in the United States and India. The expansion in castor bean production mainly reflects increases in Brazil, the United States, and the Union of South Africa. The tung crops in both the United States and Argentina were at record levels.

Output in 1953 of animal fats, which make up roughly 40 percent of all fats and oils production, registered a small gain from 1952. The outturn of butter (fat content) was larger in the principal producing areas with major increases in factory production in the United States and Western Europe. Lard output was lower chiefly because of reduced hog slaughter in the United States, where production of tallow rose substantially from the preceding year.

Marine oils production in 1953 was roughly 10 percent less than in 1952, chiefly because of the reduced whale catch during the Antarctic pelagic (open sea) season. Although fish oil production in the United States was up from 1952, indications are that output in Norway--the world's major producer--was down sharply.

Import demand for fats and oils in general is expected to remain strong throughout the large part of 1954. While most of the demand will come from Western Europe, the world's major commercial market area, expectations are that substantial quantities of soybeans and tallow again will be purchased by Japan and Formosa.

Export sales in recent months of soybeans and tallow and greases from the United States, the world's major exporting country of fats and oils, have been at record rates. Moreover, sizable tonnages of linseed oil already have moved to Western Europe while some of the surplus cottonseed oil held by the Commodity Credit Corporation is expected to be sold abroad in accordance with the surplus-sale provisions of Section 550 of the Mutual Security Act of 1951, as amended.

World prices for fats and oils in recent months have held firm or strengthened for the coconut and palm oils, lard and tallow. On the other hand prices for most of the vegetable oils have eased downward, with declines in certain of the industrial oils being especially pronounced.

FRUITS AND VEGETABLES

Fruits: World production of selected fruits in the 1953-54 season indicates an overall supply of major fruits somewhat less than in 1952-53. All except grapes, however, are above the 1935-39 prewar average. Production of grapes and citrus was higher than in 1952-53 by about 1 percent and 7 percent, respectively, but these increases are more than offset by decreases of about 20 percent in world production of apples and pears.

In North America apple production was close to the relatively low outturn in 1952 while that of pears was 2 percent below 1952 but 5 percent above prewar; the season was unfavorable in Europe for both apples and pears with production about 23 percent below the large crops of 1952. Production, however, was above prewar and Europe continues to produce an increasing percentage of the world total of these two commodities. Production was down also in Asia, where Japanese production dominates the picture. Citrus production in 1952-53 was 43 percent above prewar and a further increase of 7 percent is indicated for the 1953-54 crop.

Vegetables: World production estimates of potatoes, dry beans and dry peas indicate 1953-54 supplies of about 3 to 5 percent larger than a year ago. Increases are general in all areas with a few notable exceptions. Potato production was down in Russia, bean production in Spain, Portugal, China and Japan, and pea production in Western Europe. Europe, including European Russia, produced about 90 percent of the world crop of potatoes. Potatoes are an important food and feed, especially in Europe, and also an important raw material for the manufacture of starch and alcohol. Much of the fluctuation in the potato supply in individual countries of Europe often affects feed and manufacture more than it does food potatoes. The supply of food potatoes is considered adequate for 1953-54. Bean and pea production is much more wide spread geographically than are potatoes and the major fruits. Heaviest consumption of beans is in the Far East and the Southern Hemisphere.

SELECTED FRUITS AND VEGETABLES: Estimated World Production, Averages 1935-39, 1945-49, and Annual 1951-52 to 1953-54

	:	:	:	:	:	:Percent
	:	Averages	:	:	:	:1953-54
Commodity	:	1935-39	:1945-49:	1951-52	:1952-53:	1953-54
	:					: as of
	:					:1952-53
	:	1,000	: 1,000 :	1,000	: 1,000 :	1,000
	:	short	: short :	short	: short :	short
	:	tons	: tons :	tons	: tons :	tons
	:					:Percent
Potatoes.....	:	253,973	230,330	235,354	240,571	243,483
Beans, dry....	:	5,330	5,400	5,815	5,535	5,790
Peas, dry.....	:	738	904	823	767	802
Apples.....	:	11,951	10,734	12,267	16,230	13,000
Pears.....	:	3,265	3,600	3,652	4,908	4,008
Citrus.....	:	9,843	12,712	13,626	14,495	15,500
Grapes.....	:	39,717	33,435	36,733	34,595	35,000
Other	:					
deciduous 1/	:	7,303	7,881	8,819	8,708	8,492
TOTAL FRUITS :	:	72,539	68,412	75,147	73,936	76,000
	:					96.3

1/ Peaches, plums and prunes, cherries, apricots and pineapple.

MEAT

World meat production in 1953 was 4 percent larger than the previous record output of 1952, 20 percent above the 1946-50 average and 16 percent greater than prewar. Allowing for population gain, the 1953 supplies of meat are adequate for a per-capita consumption about 10 percent greater than the 1946-50 average or about equal to prewar.

Prospects are that meat production in most of the major areas in 1954 will equal or slightly exceed 1953. Livestock numbers as of January 1 are probably equal to or slightly above those of a year earlier in most of the principal meat-producing countries, and world feed supplies are generally larger than a year ago. While some declines are forecast for 1954 pork production in the principal pork exporting countries of Western Europe, offsetting increases are expected for a few other European countries. Some of the pressures on meat supplies were lessened in 1953, but even with slightly larger output in 1954 many of the importing countries may continue to have difficulty in maintaining meat consumption.

Most of the 1953 increase in meat output occurred in North America and Western Europe. In North America, pork output declined, but more than offsetting increases occurred in beef as heavy liquidation resulted from generally lower beef prices and drought conditions, especially in the Southwestern part of the United States. In Europe, the sharpest increases occurred in pork output, but the trend of recent years towards greater beef production continued.

The downward trend in international trade in meat was reversed in 1953 when about 9 percent more meat moved into foreign channels than in 1952. Relatively more favorable contract prices resulted in larger British imports of beef. Efforts on the part of some European countries to earn dollars coupled with strong prices and smaller domestic supplies of pork in the United States brought substantially larger European shipments of pork, especially canned hams, to the United States. Canadian exports of pork to the United States increased sharply, partially due to a price ratio of beef to pork in Canada favorable to consumers. United States imports of fresh, chilled or frozen beef from Canada were relatively small, as with favorable beef to pork prices most of the Canadian beef was slaughtered for the domestic markets. However, United States imports of canned meat specialties from Argentina and Uruguay continued near the 1952 level, although from all sources they were down 5 percent in the first 10 months of 1953.

The United Kingdom is traditionally the principal import consumer of meat, taking nearly 70 percent of the meat entering world trade. It is almost certain that the British will decontrol meat in 1954 and imports of meat, especially beef, probably will increase. However, with appreciable further increases in home production of pork, coupled with prospective larger total supplies of beef, British imports of pork may decline. This suggests that the total European supplies of pork available for export to other areas may be as large in 1954 as in 1953.

MEAT 1/: World Production by Continents or Areas, Averages
1934-38 and 1946-50, Annual 1951-1953

Area or Continent	Averages		Annual		
	1934-38	1946-50	1951	1952	1953 2/
	Mill.Lbs.	Mill.Lbs.	Mill.Lbs.	Mill.Lbs.	Mill.Lbs.
North America...	18,600	25,800	25,400	26,600	28,200
Western Europe..	20,300	16,400	20,500	21,300	23,000
Eastern Europe..	15,700	9,300	12,300	12,900	13,200
Middle East....	1,100	1,200	1,400	1,500	1,500
South America...	8,400	10,100	10,000	10,200	10,100
South Africa....	671	918	573	935	935
Oceania.....	3,200	3,300	3,500	3,600	3,900
TOTAL.....	63,000	67,000	73,800	77,500	80,800

1/ Carcass meat basis - includes beef and veal, pork, mutton and lamb, goat and horse meat; excludes edible offal, lard, rabbit and poultry meat.

2/ Estimated.

MILK AND DAIRY PRODUCTS

World milk production totaled 516 billion pounds in 1953 compared with about 500 billion pounds in each of the three preceding years. The principal increases occurred in Western Europe and North America.

Prospects for 1954 indicate that milk production will be slightly larger than 1953 in most of the major areas. In North America, dairy herds will be larger since lower carcass values will restrict culling and production per cow is likely to be greater. In Europe, larger supplies of feed indicate a continuation of the upward trend in milk production, especially in the importing countries such as Western Germany, Belgium and the United Kingdom. The mild autumn in most of the dairy countries of the Northern Hemisphere is resulting in a high level of milk production as the year 1954 is entered.

During 1953 only slight increase occurred in the total quantities of milk for fluid uses as the per-capita consumption of fluid milk apparently was little different from 1952. Thus the quantities of milk available for manufacturing purposes were appreciably larger in 1953 than in 1952.

The 1953 butter output represents a reversal of the long time downward trend in world production. Substantial increases occurred in output of factory butter in many of the principal producing countries. Total butter output in 1953 was about 3 percent greater than 1952 and is now near the 1950 level but still some 15 percent below the pre-World War II level. Moderate increases occurred in cheese output as the upward trend of recent years continued in 1953. Sharp increases were evident in the output of dried milk, but almost equally sharp offsetting declines occurred in the output of canned milk.

Exports of butter and cheese from most of the principal supplying countries were slightly larger in 1953 than in 1952. Canned milk exports declined appreciably while dried milk appears to be in easy supply and prices have declined accordingly. Latin America, the Middle East, Africa and Southeast Asia are expanding markets for most dairy products. However, the expansion has not been at a rate sufficient to offset declining imports in some other better established markets. For example, the recent contraction of British imports of canned milk has been responsible to some extent for the decline in international movement of canned milk.

The United Kingdom continues to be the principal import consumer of butter and cheese, taking about 75 percent of the butter and 50 percent of the cheese entering world trade. Milk products and fats in the United Kingdom are expected to be completely decontrolled by the autumn of 1954. This suggests, with the elimination of consumer subsidies, an

increase in prices for butter and cheese. A higher proportion of the butter than the oleomargarine ration is being taken up, which indicates a preference for butter at the present price differential. The demand for cheese, especially cheddar types, is strong and even with higher prices British imports of cheese are likely to increase with decontrol.

Stocks of dairy products are not much different from a year earlier. Excessive stocks of butter are held in only a few countries, while in the United States stocks of both butter and cheese are larger than a year earlier. World export prices, outside the United Kingdom contract prices have declined slightly throughout most of 1953. However in December 1953 prices for butter and dry milk not fat appear to be steady and cheese prices are strengthening.

Milk: World production by continent or area
average 1934-38, annual 1950-53

Area or Continent	Average 1934-38	Annual			
		1950	1951	1952	1953 1/
	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.
North America	132,000	152,000	151,000	150,000	154,000
Western Europe	170,000	176,000	180,000	179,000	188,800
Eastern Europe	160,000	97,000	97,000	96,000	96,000
Middle East	)	)	)	)	)
Far East	) 30,000	) 30,000	) 30,000	) 30,000	) 30,000
North Africa	)	)	)	)	)
South America	13,000	17,000	16,000	18,000	18,000
South Africa	4,000	4,000	4,000	4,000	4,000
Oceania	22,000	23,300	22,400	23,200	25,500
World Total	501,000	499,300	500,400	500,200	516,300

1/ Preliminary.

COFFEE

The 1953-54 world coffee crop is estimated at 39.5 million bags of 60 kilograms (132.3 pounds each) compared with 40.3 million last season, and the prewar average of about 42 million bags.

Indications are that about 31 million bags of coffee will be available for export, somewhat less than exports from the preceding crop and for the calendar years 1950-52.

Increases over 1952-53 are expected in all coffee-producing areas except North America where some record crops were harvested last season. The total for this area, however, is above average.

In Brazil, the largest contributor to the world's coffee supply, the 1953-54 production estimate has been revised downward to 18.5 million bags. Export availability from this crop is estimated at about 14.5 million bags against 15.2 million in the 1952-53 crop year.

Coffee production in Africa is forecast at slightly less than in 1952-53, with only slight changes in any area there. The quantity of coffee available for export during 1953-54 is estimated at 5.2 million bags.

Little information is available on coffee stocks, but these probably were negligible in most of the importing countries. Stocks in Brazil and Columbia were about average. Many of the other Latin American countries and several in Africa reported no carry-over at the beginning of the 1953-54 coffee year.

There has been a gradual, but slight, increase in world coffee exports since 1950. Larger shipments are going to Western Europe and Canada.

The outlook for increased coffee supplies is not very favorable. In the next three seasons Brazil may not produce the large coffee crops expected before the 1953 frosts, but exports may continue at the present level of 15 to 16 million bags. Brazil is developing plans to check the decline in production in older coffee areas by increased use of irrigation, fertilizer, higher yielding varieties, and improved cultural methods.

African coffee production has more than doubled in postwar years, and should continue to increase as new plantings reach production age.

CACAO

World production of cacao beans in 1953-54 is expected to be about 1,550 million pounds compared with 1,660 million produced in 1952-53 and the prewar average of 1,580 million pounds.

Exports in 1953 of cacao beans from producing areas to date are considerably greater than in the corresponding months of 1952.

Stocks are assumed to be small, since exports have been fairly steady, but data are not available.

The United States is the world's largest consumer of cacao beans. Consumption has remained steady for several years in the United States but has increased in the United Kingdom and other European countries.

The long-time outlook for cacao will be affected by progress in the control of several serious diseases which are present in cacao groves. A very active control program is now being carried out in West Africa. If prices and demand continue favorable, producers and governments will continue and expand efforts to combat disease and to improve cultural practices.

TEA

Production. World tea production in 1953, excluding China, the Soviet Union, and French Indochina, is estimated to be 1,338 million pounds, which is 4 percent above 1952 and more than 32 percent above the prewar 1935-39 average.

Combined production of Japan, Taiwan, British Malaya and Indonesia increased by 8 percent. These countries together produce about one-fifth of the world's tea crop. Indonesia's output was 28 percent above the previous year. In India, Pakistan and Ceylon, which grow about 73 percent of the total world production, the 1953 crop decreased by 1.5 percent from the previous year, though still 48 percent above 1935-39.

The most spectacular development in tea production has been in Africa--mostly British East Africa--where output in 1953 is believed to be more than twice that of prewar.

Trade. International trade in tea in 1953 is estimated to have totaled 960 million pounds, or slightly below 1952. In comparison with prewar, tea exports show little increase. A number of factors are probably responsible, among them, a shift in consumer taste from green tea to black tea which producers are currently unable to meet; a disproportionate increase during the prewar and postwar periods in tea prices compared to prices for other principal beverages; and a notable increase in world consumption of coffee, cocoa, soft drinks, and prepared fruit and vegetable drinks.

Outlook. No significant change in world tea production is anticipated in 1954, although some producer countries face internal production problems. Reflecting a world-wide trend, India, Ceylon, and Pakistan are witnessing a considerable general upswing in the cost of living and wages of tea workers.

Many new production areas are currently being developed in Africa and the Middle East. Notable increases in production are likely in these areas.

COTTON

The cotton supply position, which at the end of World War II was one of unprecedented surplus, has since been twice reversed, and after a threatened shortage in 1950-51 cotton is again in surplus. World consumption since 1950, in the range of 32 to 33 million bales annually has been at its highest levels in history--about 17 percent above that of the late prewar years. The world crop, however, in 1953-54 and the two preceding seasons has exceeded consumption each year by about 3 to 3.5 million bales, and the stocks carried over from one season to another have been increasing accordingly.

Present indications are that cotton carried over on August 1, 1954, may be from 20.5 to 21 million bales. This might be compared with the abnormally high stock of 28.5 million on August 1, 1945 (which equalled more than a year's consumption at that time), the 23.7 million bales of August 1939, and the abnormally low one of 11.8 million bales in 1951.

The present world abundance in the face of record consumption comes about from a combination of high-level production abroad and in the United States. Responding to the attractive prices and the demand for cottons that could be purchased for currencies other than dollars, crops outside the United States had by 1951 in the aggregate regained and slightly overtopped their prewar peak of roughly 20 million bales--a level which, with small variations, they have since maintained. United States crops in the past 3 years, ranging upward from 15 million bales, have been 2 to 3 million bales larger than those of the late 1930's but roughly in line with those of the period preceding the introduction of production controls in 1933.

With the recent relationship between United States cotton prices and prices of foreign growths, countries other than the United States have moved their crops largely into consumption and a world surplus of cotton, above necessary pipe-line and working supplies, has accumulated, largely in the United States. By August 1, 1953, United States carry-in stocks of 5.5 million bales, taken in combination with the oncoming crop of 16.4 million, provided a supply so large as to necessitate under existing law a reduction in the United States crop of some 39 percent in 1954. With assurances that legislation will be sought to ease this drastic and unprecedented curtailment before the new planting season has passed, growers have accepted and ratified this action. Thus the United States has undertaken a major role in restoring the balance of world supplies with world consumption. At the same time, it is expected that the food production programs in Egypt and Pakistan will continue to retard expansion of cotton in those countries, and lower prices are tending to discourage expansion in some newly developed areas.

COTTON: Production and exports by principal regions of the world

(In thousands of bales of 500 pounds gross)

Area	Average	Annual				
	1935-36	1950-51	1951-52	1952-53	1953-54	
	1939-40					
Production						
United States.....	13,149	10,012	15,144	15,136	16,437	
Other Western Hemisphere	3,085	3,844	4,519	4,131	3,692	
Asia 1/.....	12,468	10,948	12,759	12,674	13,361	
Europe.....	147	198	228	255	301	
Africa.....	2,840	3,103	3,054	3,526	2,821	
Total world.....	31,689	28,105	35,704	35,722	36,612	
Exports						
United States.....	5,589	4,280	5,711	3,181	---	
Other Western Hemisphere	1,746	2,137	1,726	1,992	---	
Asia 1/.....	3,272	2,653	2,541	3,318	---	
Europe.....	2	7	21	26	---	
Africa.....	2,638	2,801	2,181	3,064	---	
Total world.....	13,247	11,878	12,180	11,581	---	

1/ Includes U.S.S.R.

WOOL

World wool production in 1953 is at an all time high of 4,410 million pounds, greasy basis (about 2,540 million pounds clean). This is an increase of 80 million pounds over last year's record output and 210 million pounds or 5 percent over the earlier high of 4,200 million pounds in 1942. As wool produced in 1953 is largely available for consumption in 1954 this means that supplies of wool in 1954 from the current clip will be somewhat larger. However, because of reduced carry-in, total supplies available will be somewhat less than in 1953.

World wool output has increased each year since the postwar low of 3,700 million pounds in 1947, reflecting general recovery from drought in the more specialized wool producing areas, the more favorable competitive position of wool relative to other farm enterprises in major wool-producing countries of the Southern Hemisphere, and the sustained demand from wool consuming countries. Production in all major countries, with the exception of the United States, is above prewar levels.

Output in 1953 in all of the main producing countries of the Southern Hemisphere (Australia, New Zealand, South Africa, Argentina, Uruguay) is expected to be slightly above last season which was at a record level largely as a result of increase in output in Australia. The large outturn there was made possible by the sharp reduction in rabbit numbers because of the disease, myxomatosis (which followed upon the improvement in the quality and quantity of pastures). In that season wool production in Australia went up as a result of increased yields per fleece by nearly 20 percent, while sheep numbers went up only 4 percent. It is thought that in the years ahead the rabbit population will be kept under control and sheep numbers will continue to increase to the extent of pasture available, while fleece yields will return to a more normal level.

World wool prices strengthened steadily from the low point in April 1952 until May 1953 and production was encouraged. At the same time consumption and forward buying by mills was stepped up and in the past 15 months the trade has absorbed for the most part the large 1952 production plus the carry-over from 1951 in South America. Except for the accumulation of about 100 million pounds under the United States price support operations and some additional build-up in the United Kingdom strategic stockpile, there are no outstanding world stocks of wool and annual consumption and production are approximately in balance.

It now appears, however, that world consumption dropped off in the third quarter of 1953 following a steady increase since the end of 1951. This raises some doubt that the current large clip will be entirely marketed at the prices now prevailing.

WCOL: Estimated world production, greasy basis,
by continents, averages 1936-40, 1946-50,
annual 1949-53.

Continent	1936-40 - 1946-50						
	Averages	1949	1950	1951	1952	1953	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
N. America.....	452	309	270	271	272	288	286
Europe.....	483	426	448	465	479	494	503
U.S.S.R.....	310	312	-	350	380	400	400
Asia.....	344	356	346	362	375	393	402
S. America.....	639	735	708	740	737	725	747
Africa.....	337	282	283	305	323	346	354
Oceania.....	1,366	1,422	1,500	1,508	1,487	1,698	1,731
Total 1/	3,930	3,840	3,890	4,000	4,050	4,330	4,410

1/ Rounded to tens of million pounds.

JUTE AND HARD FIBERS

Jute: World jute production was 2.5 billion pounds in 1953, 4.7 billion pounds in 1952, and averaged 3.5 billion pounds in 1947-51. The current supply, including the small 1953 crop and carry-over from the large preceding crop, is believed by most trade groups to be adequate except, possibly, in the better grades. The world emerged from a period of scarcity into one of plentiful supply in 1952. Prices had been abnormally high for several years but declined as the extraordinarily large 1952 crop began to move into the market. As of mid-1953, prices were slightly above those of the preceding 12 months but seemed to be leveling off about in line with mid-1947 and higher than in earlier years.

Pakistan and India still product at least 96 percent of the world's jute, but Brazil has developed within 2 decades from negligible production to third place with 40 million pounds. Since partition in 1947, India, in an effort to supply domestic mills, has increased its crop from 0.7 billion pounds in 1947 to 1.9 billion in 1952. The reduction of the crop in 1953 to only 1.4 billion pounds was the result of lower prices and poor planting weather.

Pakistan applies acreage controls in an attempt to afford its growers remunerative prices. The Pakistan crop was cut to 1.3 billion pounds in 1949 but increased to 1.9 billion in 1952 as higher prices encouraged planting in uncontrolled states. In 1953, however, less than the permitted acreage was planted and a crop of only 1.0 billion pounds was produced.

Hard Fibers: World production of the 3 principal hard fibers—abaca, sisal, and henequen—reached a record 1,372 million pounds in 1952 and is continuing on a high level. The prewar average was 1,141 million pounds.

Production of abaca at 296 million pounds is still below prewar because of slow recovery from war damage and unsettled postwar conditions. The Philippine production is now only 83 percent of the world total, the Central American postwar development having reached 34 million pounds. Henequen production is again at the prewar level after expansion to 306 million pounds in 1948. Sisal production was increased for war needs and has reached 830 million pounds, some 64 percent above the prewar average of 507 million pounds. British East Africa with an increase of 70 percent accounts for 447 million pounds or 54 percent of the total. Brazil has increased from a negligible prewar production to second place with 132 million pounds. Portuguese Africa, Indonesia, and Haiti account for 191 million.

The 1951 bread in the rising price trend caused concern among hard fiber growers. In 1953 prices rallied slightly for abaca, but continued their downward trend for henequen and sisal. As of September 1953 henequen prices in New York were at about one-third of the peak but nearly 77 percent above the prewar average; sisal was less than 40 percent of the peak, but 2 to 4 times the prewar level; and abaca was roughly two-thirds of the peak, but around 3 to 5 times the prewar average.

TOBACCO

Production: World production of tobacco of 7.3 billion pounds in 1953 is estimated to be slightly above 1952 and the 1947-51 average and approximately 12 percent larger than the annual average during the 1935-39 period. The upward trend in production of flue-cured and light air-cured, primarily for use in cigarettes, continues as the demand for dark types of tobaccos declines further.

Stocks: Total world stocks declined somewhat in 1953 as supplies from increased production in recent years has been more than offset by increased consumption. Decreasing levels of stocks are particularly noticeable in numerous important importing countries of Western Europe as well as in the Republic of the Philippines and other areas.

Consumption: World consumption continued to increase in 1953 largely because of the increased use of cigarettes. Increasing numbers in the adult population, higher levels of consumer income, and improved gold and foreign exchange positions in the major importing countries were the most important factors. The large upswing in Germany since mid-1953 is of particular importance. High taxes on tobacco products in numerous countries, especially in England, continue to depress consumption.

Outlook for 1953-54: The demand for tobacco products in the coming year is expected to be determined largely by the levels of economic activity, which are expected to remain high in most of the countries which import tobacco.

Increased imports of unmanufactured leaf by numerous Western European countries are warranted in order to rebuild stocks. Although world trade in tobacco is expected to increase in 1954, United States producers will face increasing competition from flue-cured leaf grown in Southern Rhodesia, Northern Rhodesia, Brazil, Canada, and India. Also, the expected liberal offerings from Nyasaland will have an important influence on fire-cured and dark air-cured exports from the United States. In Southeastern Europe keen competition is expected from oriental tobacco from Turkey and Greece.

Demand for cigars improved in 1952 and in 1953 remained above the level of recent years. This level is expected to be maintained in 1954, depending chiefly on the over-all consumer income in the major cigar-using countries.

U. S. Exports: United States exports of unmanufactured leaf during 1953 were about 20 percent above 1952 but exports in 1952 were unusually small primarily due to abnormally low shipments to the United Kingdom. Estimated takings in 1953 are somewhat lower than would have been shipped if the quality, particularly of flue-cured in the Middle and Old Belt, had not been adversely affected by severe drought. Shipments in 1954 may be about 5 percent above those for 1953, particularly of flue-cured for rebuilding depleted stock and meeting requirements for increasing consumption.

TOBACCO: Production ^{1/} by continents, averages 1935-39,
1947-51, and annual 1952 and 1953

Continent	1935-39 Average	1947-51 Average	1952	1953 ^{2/}
	1,000 <u>pounds</u>	1,000 <u>pounds</u>	1,000 <u>pounds</u>	1,000 <u>pounds</u>
North America	1,698,562	2,459,331	2,639,528	2,441,202
Europe				
Western	445,169	546,299	485,458	571,991
Eastern	211,231	221,449	166,000	215,200
USSR (Europe & Asia)	525,000	450,000	450,000	450,000
Asia	3,199,702	2,930,216	2,800,329	2,923,386
South America	305,747	379,625	407,287	435,796
Africa	126,943	235,520	267,714	274,699
Oceania	6,643	8,574	13,498	11,620
Total	6,518,997	7,231,014	7,229,814	7,323,894

^{1/} Production harvested in calendar year shown.

^{2/} Preliminary.

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